STRAIGHT TALK

Guidelines and Tools
For Achieving
Best Practices in
ESU Branches

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1. Introduction

In the fall of 2012, at a meeting of regional chairs, members discussed methods of developing contemporary, straightforward, easy-to-implement guidelines and tools to help branches succeed in key areas of their operations. Subsequently, the ESU Board appointed a Task Force to look into the matter of branch revitalization.

It was clear that ESU needed to find ways to assist branches in sustaining themselves in rapidly changing times. To thrive, branches must attract new members to exciting and innovative programs and activities. For several years, branches had asked that examples of best practices and strategies be shared.

The Task Force includes regional chairs, branch presidents and other branch leaders each of whom had some degree of success in the selected areas chosen for developing Best Practices Strategies.

This compendium of those best practices and strategies, called *Straight Talk* is designed to help branches:

a) Bring new life to branches with declining membership;
b) Add a spark to creative programming that would excite existing members and help attract new members;
e) Expand one of the core values of the ESU by developing new and creative Educational Outreach programs for teachers, students and members.
d) Share successful fundraising strategies between Branches;
e) Develop progressive governance guidelines for Branches that offer flexibility in organizational structure
f) Find new ways of communication throughout the organization, including digital, both at the National and branch levels, that deliver our message to members and the public in a timely manner and in ways that can be adapted to various branch demographics;

From the beginning of this project, the Task Force realized there is a wide diversity among branches—in size, demographics, organizational structure, varying philosophies in approaches to programming, and styles of management. It is not the purpose of this project to standardize all branches in all these areas. We celebrate this diversity and understand each branch must address all areas of its operation according to the needs of its members.

*Straight Talk* guidelines are just that—guides and tools to give branches new ideas and approaches to the challenges of today. Some of these Best Practices can be quickly adopted, others have to be modified to suit a branch’s situation and some will not work at all in some branches. If branch leaders approach these suggestions as a tool to help address an area that has been a challenge in their branch, then the Task Force will have succeeded in its mission.

If you find that some do not work in your branch, don’t get discouraged. Discuss your situation with other branches and your regional chairs. Sharing your experiences with others may be just the spark that makes a difference.

This brings us to the concept of *Straight Talk*. There is one underlying principle that will make these goals a reality—straightforward communication among all levels of the organization by sharing ideas from the bottom up and the top down—that is *Straight Talk*. 

Straight Talk is a work in progress. This is the First Edition. With contributions from branches and National Headquarters throughout the year, Straight Talk can be updated at least twice yearly, if not more often as the need arises.

The work of this Task Force has been coordinated with and supported by the National Headquarters. It is important to note, however, that the Task Force assumes responsibility for the structure, content and suggestions in the document. All regional chairs have participated, along with selected branch leaders. Information about branch practices has been collected and shared. This First Edition of Straight Talk is an example of what can be accomplished with cooperation among branches, regional chairs and the National Headquarters.

Branches are encouraged to add content to Straight Talk. It is important for branches to learn from each other about practices, events and processes that work. New information and updates should be sent to straighttalk@esuus.org. Headquarters will assemble the new submissions and send them to the Branch Services Committee for review and editing. A new committee, the Branch Services Committee, was established by Board action at the AGM in Seattle in September, 2013.

Finally, as you are reading through Straight Talk, we would appreciate any feedback on these Best Practices Guidelines. Alice Irby, the Chair of the Task Force can be reached via e-mail at aliceji@nc.rr.com.

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2. Membership

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**Introduction**

Declining membership is plaguing all organizations nationwide, both for profit and non-profit, and this is the case with some ESU Branches today. The solutions to reverse that trend are not easy. Many ESU Branches had over 300+ members in the ’60s and ’70s and are now trying to rebuild from a small base of one-tenth of that original number.

Some of the reasons for this decline in membership are obvious, some are not. Recognizing that there are so many more organizations (for profit and non-profit) competing for members now than there were back in those days and also facing so many other activities that occupy people’s lives, it’s difficult to differentiate the ESU organization and make its goals and programs stand out in the community.

The effort to find new members will certainly vary from city to city depending on resources and other ESU programs that you can use to promote the ESU. Branches are constantly struggling with finding the right approach to attract new members that works.

There are several strategies that can be used and the success of these membership drives will probably not be realized for several cycles of fiscal years’ activities. It’s a slow process but we have to keep working on new ideas all the time…some work and some don’t. Here are some strategies that may work in your branch.

Try to keep an open mind when reviewing these strategies. They may, at first, seem impractical to implement in your branch but discuss a variation of a strategy with your membership chair and give them a try. Some of these strategies will be a big success and other may have mixed results. Perhaps you will only see positive results over the long term—maybe 2-3 years.

**Strategy #1: Focus on Two New Categories of Members**

**A. A younger demographic—age 35 and under**

Many branches have an older median age of membership, and we recognize we must get some younger people in the mix of members. The reasons for this are fairly obvious: an existing membership base remained static over the years without any significant growth in new members and, in fact, many of those members left the branch. The member base has been reducing in size and growing older. So, the question is: how to add younger members?

Some branches have had success by adding a “Junior-Single” and “Junior-Couple” to their membership categories. This new “Junior” category is simply defined as “35 and under.” The membership rate for this “Junior” category is only slightly reduced from the “Regular” Single and Couple rates. The difference in rates is not that significant but at least this creates a new category that recognizes younger people.
By highlighting that younger group, we are letting potential members know that we want to welcome and encourage young people to join. One idea that puts a focus on this “Junior” category is to go back to the first, second and third place winners of your Shakespeare Competition from several years ago…not recent competitions but those winners who are now in their mid-twenties to early thirties.

Many branches have board members or regular members who are retired high school teachers who were heavily involved with the Shakespeare Competition in their schools and they know many former students who participated in the Competitions in their schools.

Some of these board members and members may have kept in contact with some of those former students over the years. These student contacts could lead to a discussion about possible membership.

Sometimes, all it takes is one former student who is very enthusiastic about this recruiting idea and he or she might be willing to help create an “ESU Junior Member Group”—this group would consist of former students who competed in the Shakespeare Competition from roughly 2008 and before. They would be in their early to mid-twenties and older which is the age demographic we are looking for. More recent Competition winners, ages 16-17, will be going to college and moving out of town and would probably not continue as a member beyond the first year anyway.

The mid-twenties to early thirties age group has probably completed college and even graduate school and is in the early stages of their careers. Their former connection with the Shakespeare Competition gives them a head start in understanding what the ESU is all about. When they take a look at the wide variety of activities and events your branch offers, there will hopefully be some programs that would interest them.

**Try starting with 3-5 of these young people who would be “charter members” of this new Junior member category.** One goal of this Junior Charter Group would be to develop a couple of ESU activities throughout the year that specifically appeal to the “Junior” category of member.

Hopefully, these “junior activities” would stimulate other friends of this Junior Charter Group to be interested in joining. Encourage the Charter Group to think of other ways to promote ESU membership in the Junior category.

Of course, all ESU members would be invited to participate in all activities and events in your branch, even though some events might be geared more toward a younger member. You may experiment with this “Junior Member Group” strategy in its early stages of development for a year or two but with close monitoring of this junior group’s activities, it could have long-term benefits for your branch.

In the appendix is a sample of an email you could modify and send to this group of five potential candidates for the Junior Member Charter Group.

As your Junior member base grows over time, it would be wise to add 1-3 Juniors to your board of directors so they have a direct involvement and input in the governance of the branch.

**B. Educators**

Education is a primary component in the ESU’s Mission Statement. The ESU is fundamentally grounded in education-based goals and programming. Many branches have several retired teachers on their board and other members who are former teachers. It’s important to encourage teachers to be members of the ESU for the above reasons. Therefore, try adding another category of membership called “Educator-Single” and “Educator-Couple.”
This new category is simply defined as “a full-time active teacher or school administrator in an accredited high school or 2-4 year college or homeschool.” If the national portion of dues of these members is $35 for singles and $50 for couples, they will be entered into the national roster as members and receive membership cards etc. If it is less, they may be entered as prospective members on the national roster. The main objective with this category is to highlight the importance of the Educator to our membership with this special member category.

**The first and most obvious educator group to approach are the high school teachers who participate in your Shakespeare Competition.** They are already familiar with the ESU organization, generally, and have worked with your Branch Shakespeare Coordinator for several months with their school’s local competition. So they even have a direct contact with your branch. Several of your high school teachers probably have been participating in your Branch Shakespeare Competition for several years and they likely know some ESU members and board members as well.

Try sending a letter to the high school teachers who participated in this year’s Shakespeare Competition inviting them to become members of the branch. A sample letter is included in the Appendix.

Educators attract more educators. ESU members who are current or retired high school teachers have a wealth of friends, associates and other contacts who are also educators. Encourage members who know a fellow educator who may be interested in the ESU to let your Membership Chair know. This ties in directly with Strategy #2…

**Strategy #2: New Member Candidates from Referrals**

On the surface, this may be the most obvious strategy and the primary method used in most branches to find new members. What better way to promote an organization than through committed and enthusiastic members referring friends, acquaintances, relatives, young or old. Well-implemented membership drives, occasionally using incentives for finding new members, have been used by organizations for decades and can be effective.

The Monmouth New Jersey Branch used an effective incentive for new members as follows: A free admission to any ESU Monmouth event is awarded to any member who signs up a new member. This award is presented to the member when the new member enrolls. This does not apply to renewal memberships, only new members.

Try taking a pro-active approach with member referrals. Put together a membership recruiting packet which includes, 1) a carefully worded membership recruiting letter from the president or membership chair, 2) the tri-fold ESU brochure (from National), 3) a short history of your ESU branch, 4) a recent newsletter listing upcoming activities and, of course, 5) an enrollment form. A sample letter is included in the Appendix.

Make reference in the letter to the ESU member who was referring the possible member candidate so the letter doesn’t appear to be a form letter but is personalized to the specific candidate. This very personal referral process is likely to result in new members.

**Strategy #3: Solicit New Members at ESU Events**

Again, this is an obvious method of recruiting but it is one of the more effective strategies in finding new members. There are numerous ESU-themed events that lend themselves to simply signing up the ESU Branch with an “Information Table.”

Your information table could include a display of photos taken at previous ESU events showing the kinds of activities in which your members participate, various brochures, flyers, enrollment forms and other material that people could take with them as they walk by the table.
The table should be staffed with at least one ESU member who hands a tri-fold brochure to a passer-by and asks if they know about the ESU. Of course, this is done in a friendly and non-invasive manner.

For the past 28 years, the Daughters of the British Empire host a British Faire fundraiser in the Kansas City area which has become a major attraction. It draws thousands during the day-long event. There are British items for sale including specialty foods, crafts, Celtic and Scottish goods, there is entertainment including a bagpiper, Highland and Celtic dancers, kids’ activities, face painting, British cars, a visit from the Renaissance Queen and her court and, of course, a traditional British Afternoon tea. The ESU has had an informational table at this event for many years and this event alone has attracted new members.

An informational table can be placed at most ESU events such as at the entrance to a lecture and the Shakespeare Competition. During introductions at various events, be sure to not only tell the mission and goals of the ESU organization to the group, but also explain that the ESU is a member-based non-profit and welcomes all members. When possible, physically hand one of the tri-fold ESU brochures to guests when they are entering the lecture hall, auditorium or restaurant so they have something to take with them.

**Strategy #4: Promote ESU Events Using Press Releases and “Friends of ESU”**

These are indirect methods of attracting interest to potential ESU members but they can be effective. It’s important to keep the “ESU Brand” as visible as possible so the media and others who have an interest in the ESU know about our organization, our events and activities. Both of these approaches have no cost to the branch but sometimes can result in valuable media exposure and even new members.

**Press Releases**—Make generous use of press releases for ESU events that are open to the public or any event that is not a members-only activity. Examples of these events are the Shakespeare Competition, the Evelyn Wrench Lecture, other lecture programs, ESU co-sponsored events with other partnerships such as the public library or other non-profit organizations etc.

**“Friends of ESU”**—This is simply a list of names compiled over the years of people who have signed up on an Email List sheet which you can make available at all of our events open to the public. This list is for people who would like more information about the ESU. When you send out email announcements about an ESU event that is open to the public, send it to your “Friends of ESU” email database. You will likely attract new members from this list.

Another way to add names to the “Friends of ESU” list is to ask members to provide names and email addresses of their friends, relatives, and acquaintances who they think would be interested in receiving periodic emails about upcoming ESU events. Be sure to include names of younger friends, relatives and acquaintances of members to your “Friends of ESU”. In the Appendix is a sample ESU Email Log to collect names of those interested in more information about the ESU.

**Strategy #5: “Gift of Membership” Holiday New Member Promotion**

Last December the Kansas City Branch created a new holiday promotion called “Gift of Membership.” This promotion allows new members to join at an introductory rate through the remainder of the fiscal year—basically a six-month membership that is only offered in December for holiday gift-giving. The enrollment deadline is December 15. This holiday introductory rate is $25 for single and $40 for couple memberships. This special Gift of Membership expires on June 30. But, of course, they would be invited to continue their membership in the new fiscal year at the regular membership rate for which they would qualify.

This is a great way for existing ESU members to offer a unique gift to friends, relatives or others who, otherwise, might have a hard time finding the perfect gift. The National Office would not take any portion of these dues, because they do not qualify for the levels of $35.00 for a single and $50 for a couple specified in the national bylaws, so 100% of these holiday introductory rate dues will stay in the branch. As a result these gift
recipients will be entered in the national roster as prospective members until they renew at the standard rates. Also, the member who purchases one or more of these "Gift of Membership" certificates may be able to receive a tax deduction on their "Gift of Membership" purchase just like they get with their own regular membership dues.

All of this is transparent to the new member who simply receives the special "Gift of Membership" certificate for their partial-year membership which has an expiration date. They will also get a "Welcome" letter from the Branch president.

Because the branch put this promotion together until early December, they didn’t have much time to promote it to branch members so it got off to a late start. In spite of that, everyone thought it was a great idea and the branch still had one new member as a result of this promotion. This year, the branch will kick off the “Gift of Membership” promotion in the second or third week of November to give members plenty of time to decide if they want to purchase the certificate. Put a deadline for sending in the “Gift of Membership” Enrollment Form of December 15. This promotion ultimately proved successful with this six-month member renewing for a full year beginning 7-1-13. In the Appendix, you will find sample material used for this promotion:

1. The email sent to all members explaining the promotion. For this report, the email was put in a Word document for easier reading.
2. The Gift Certificate template customized for this promotion.
3. Gift of Membership Enrollment Form
4. A sample letter sent to the new member recipient welcoming her as a new member and explaining that her membership was good through June 30.

**Strategy #6: Fourth Quarter Bonus for New Members**

As you know, the ESU membership year begins July 1 and ends June 30 (this is also our fiscal year for financial reporting purposes). In June, membership renewal notices are sent to members for the next membership year that begins July 1, 2013.

There is an opportunity in the fourth quarter of the fiscal year to encourage new members to join during that period. If a new member enrolls during the fourth quarter of the fiscal year, that is, during April, May or June, the ESU will allow that new member’s membership to carry over into the new fiscal year. That means the new member gets one, two or three extra months in their first-year membership depending on what month in the fourth quarter they enrolled. Obviously, this only applies to new members.

This strategy is very simple: just send members an email at the beginning of April each year mentioning that we are now in the fourth quarter. Suggest that if they know someone who is right on the edge of deciding to join, maybe these little extra “bonus” months would encourage them to join now rather than wait until the new fiscal year begins.

You could use this example: If a new member joined on April 1, 2014, their first-year membership would actually be 15 months long—from April 1, 2014 through June 30, 2015. Of course, they could still join on July 1, 2014, or in any other month for that matter and we always encourage new members to join anytime. Again, these extra months of membership might encourage them to not wait to join until the new fiscal year begins.

A sample email to members explaining this Fourth Quarter Bonus for new members is in the Appendix
**Strategy #7: Recruit New Members at Co-Sponsored Events**

Identify organizations in your city, either for profit or non-profit, which have similar interests or compatible programs with the ESU (The Rotary Club is a good example but there are many others). Contact the leader of that organization and discuss the possibility of holding a joint meeting with members of both organizations.

In regions of the country where there are two ESU Branches relatively close together, include both ESU Branches in the co-sponsored event. The membership committees from both branches can work together on the new member recruiting plan for the larger combined co-sponsorship. Both branches benefit from the co-sponsorship and costs associated with the event are cut in half for each branch.

This joint effort could involve a co-sponsorship where each sponsor helps fund the event or provides other non-monetary contribution to the event or it could be as simple as informing ESU members of the event and they could attend on their own but with the knowledge of the event’s sponsor so ESU could be acknowledged at the event in some way. This joint effort can have advantages for both groups:

1. It turns a small event into a large event by combining groups.

2. It offers an opportunity for the ESU group to expand its programming opportunities without a lot of extra effort.

3. If the co-sponsored event is a major event with press releases and media coverage, the exposure of a larger event for both groups will pay dividends in the future.

4. More importantly, it provides a tremendous opportunity for recruiting new ESU members by either talking about the ESU one-on-one with the other group’s members, having ESU brochures available to the other group and, ideally, during the introduction to the program, the MC briefly mentions the ESU’s Mission Statement and invites new members. It’s a win-win for both groups!
3. Programming

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Introduction

Successful programming for ESU events and activities is the lifeblood of the ESU organization. Programming defines who we are, why we exist, our interests and our goals. In this changing cultural climate, branches must adapt, just as the ESU must adapt, to remain relevant. Programs are the key.

For members to stay interested in the ESU, there must be diversity in programming—not just in topics but in types of activities that appeal to a broad age range of members. To succeed, programs must be timely, topical, and interesting. This section on Programming Strategies is intended to not only give ideas on successful programs but, hopefully, give that spark to create programs that excite existing members and help attract new members.
To better define ESU programming, we have listed some General Characteristics of Successful Program Strategies followed by Specific Programming Strategies and examples.

**General Characteristics of Successful Program Strategies**

Listed below are general characteristics that define successful program strategies. Survey your own branch programs to see if they match some of these characteristics. If your branch can apply some of these characteristics to your programs, you will certainly have the diversity in programming that will help retain members and, hopefully, increase membership as well.

**Present Programs that Appeal to Members and Potential Members**

Shakespeare’s works play an important role in ESU’s programs and for those branches hosting a Shakespeare competition or other Shakespeare-related event, the yield is high. However, too many Shakespeare-themed events can get boring. Shakespeare cannot be expected to sustain a Branch all year long. branches should focus on programs that appeal to the members. Survey members from time to time to get a sense of their diverse interests.

**Present Programs that Target a Younger Demographic**

Far from being static, the ESU’s membership is constantly evolving and, if the organization’s membership strategies succeed, there will be an influx of younger members attracted to the ESU because the programs appealed to them. The younger generations have been shaped by electronic communications, social networks, and technology. They seek art and culture through music, film, and mixed media. Harry Potter and The Lord of the Rings sparked a worldwide phenomenon and defined a generation. Programs that appeal to a younger demographic will probably still have interest in an older demographic. The key is diversity in programming.

**Present Programs that Focus on Milestone Events**

The United States is in the middle of six major commemorations: the centenary of World War I, 2014; the bicentennial of the War of 1812; the sesquicentennial of the end of the American Civil War in 2015; the 75th Anniversary of World War II, the 800th anniversary of the Magna Carta in 2015 and the 200th anniversary of the national anthem *The Star-Spangled Banner* in 2014. And President Kennedy’s short life will certainly be commemorated this fall on the 50th anniversary of his death. Further, the ESU US’s centennial looms--just seven years away (2020). Programs should be offered to take advantage of the members’ interests in these milestone events.

**Tailor Programs to the Locality**

Branches have found that programs tailored to the locality usually succeed. For example, members of the Nashville Branch respond favorably to programs on country music. Members of the Charlottesville Branch would respond to a program on Mr. Jefferson. Members of the Denver Branch would respond to a program on the silver barons. The Program Committee should carefully consider local history and culture in planning its programs.

**Co-Sponsor Programs with Other Organizations and Other ESU Branches**

This can be an important strategy, especially when good programs are in short supply or when attendance is lagging. Almost all organizations face the same challenges that the ESU does. A good working relationship with other organizations will create synergy: Better programs, more enthusiasm, and dual memberships.
Several “membership” organizations come to mind, including The Jamestowne Society, The Mayflower Society, and The Churchill Centre. However, there are many more. They are often more than happy to co-sponsor programs. Colleges, Institutions and even middle and high schools are also strong possibilities as co-sponsors. Public libraries, museums, other non-profit organizations and certainly corporate co-sponsors should all be approached for co-sponsoring ESU events.

In regions of the country where there are two ESU Branches relatively close together, include both ESU Branches in the co-sponsored event. Both branches benefit from the co-sponsorship and costs associated with the event are cut in half for each branch.

Further in this section on Programming Strategies are several detailed examples of co-sponsored events that Branches can consider when developing their co-sponsorships.

**Identify Qualified Program Speakers**

The Program Committee must take the time to “qualify” potential speakers, as a “flat” program will drive members away. A speaker’s talent for public speaking, as well as his/her credentials, must be verified in advance.

Good speakers are not hard to find. Each branch has a number of good speakers within its membership, and they have interesting stories to tell. Additionally, National Headquarters offers three speaker programs: the Evelyn Wrench Speaker Program, the Mimi Wilson Sourcelist of Speakers and Authors on Tour. These programs are coordinated by the staff at National Headquarters and all of these speakers have been vetted. Most of these speaker programs have nominal cost to branches. Click here for details about arranging an event around these various speaker programs.

Other organizations will supply the names and contact information of good speakers. Service organizations, such as Rotary International and Kiwanis, veterans’ organizations, heritage organizations (such as the Daughters of the British Empire and the Sons of the American Revolution) can recommend good speakers and supply speakers. Independent Living Centers are good sources for speakers. Retired flag officers are often good speakers, with a lot to say. Many of our branches are located in areas with large retired military populations.

**Vary Meeting Formats**

Branches must come to terms with changing tastes. The younger generations are not getting dressed up in tuxedos and evening gowns as much as the older generations. Still, the annual black-tie dinner is most likely an indispensable tradition in most branches, but any more than that may backfire.

Branches should experiment, to see what works best. Many branches are finding more success by hosting informal gatherings, where “business casual” or “casual” is the uniform of the day. That seems to resonate with members of all ages. Many branches are shifting weeknight programs to Sunday afternoons. Members are less tired, more inclined to leave the comfort of their homes, and more confident if they are driving (especially older members).

Cost is a growing concern. Country clubs are expensive. However, many branches are meeting in the homes of their members. Members want to host events. Many members have attractive collectibles that they want to share with their friends. Some programs have been built around the host members’ collectibles (china, silver, art, furniture, carpets, etc.) Program Committees should ascertain the availability of members’ homes for suitable occasions.
Not every meeting needs a program. Branches should consider holding one meeting a year where members gather to meet and greet each other only. As the years go by, members form strong friendships with one another, and a yearly meeting featuring good food and drink is all that is necessary. It might even be the highlight of the year!

**Promote Attendance**

Organizations that rely exclusively, or almost exclusively, on email invitations are borrowing trouble. Emails are read and forgotten. The printed invitation has a longer shelf life. Experiment with a mailed invitation to an event to see how members respond.

Effective branches adopt several strategies to promote attendance. Local newspapers are almost always happy to run announcements of meetings. Few branches avail themselves of this free publicity. Among the time-honored strategies are telephone trees and car pools. Are branches calling members who usually attend? These are the members who have likely misplaced their invitation or have forgotten. They should be called. The car pool is important, especially where an aging membership is involved. More and more members don’t drive at night, or don’t drive if they have to park on a hill. A car pool sounds like a big undertaking, but it only takes two or three volunteers.

**Evaluate Programs**

The ESU is like any other organization: It should continuously improve, and to do that it must constantly evaluate. How do we know that a program clicked with the membership? A branch should consider some method of evaluation; whether it takes the form of randomly placed phone calls or something more direct such as a questionnaire placed on the table or handed out as members are leaving. Feedback is important, especially if that feedback will help the branch present programs that appeal to members.

**The Programs Committee**

Successful programs do not take on a life of their own. They are usually the product of a lot of legwork. The Programs Committee should consist of a handful of members willing to make the phone calls, ask the right questions, preview the program (if possible), and make the decision on whether the program serves the branch’s best interests. This is a commitment to deliver a quality product.

**Specific Program Strategies by Category**

Most programming for the ESU falls into three broad categories—Educational, Cultural and Social Programs. A successful schedule of programs throughout the year will have a mix of all three. It is also possible that an individual program can even have a mix of two or all three categories. Balance is the key. Members like variety in programming.

Listed below are a few examples of specific Program Strategies for each of the three broad categories. Initially, these examples are referenced from just a couple of branches. It is the goal of *Straight Talk* to expand these programing examples and we welcome and encourage branches to submit examples of your programs and events that have been successful in your branch. The Appendix of *Straight Talk* will eventually have many examples of successful programs submitted by branches and will be a helpful resource for your branch programming committee. By sharing proven successful programming strategies among branches, everyone benefits—the branch, its members and the general public who attends the programs.
Educational Programming

Strategy #1: Implement Multiple National Educational Programs

The ESU is fundamentally grounded in education-based goals and programming. Virtually all of our National Programs are education-based: The Shakespeare Competition, Books-Across-the-Sea, the various scholarship and fellowship programs such as BUSS and the Walter Hines Page Scholarships, English in Action, debate programs, Evelyn Wrench Lecture Series, and Shakespeare Set Free Institute to name a few—all have components of education. These programs have well-established formulas for successful implementation and they bring the ESU into the national and local spotlight.

Some of these national programs are relatively easy to implement and others are more complex. The opportunity for branches to participate in these National Programs depends, in part, on a) the size of the ESU Branch, b) available funds to sponsor some of these programs, and c) resources and personnel in the branch who are willing and able to manage and administer the program.

Some of these national programs are of direct interest to members such as the various lecture programs while other National Programs offer educational opportunities to one individual or a small group such as the BUSS program and Shakespeare Set Free Institute. Even these programs can be turned into a programming event for ESU members by inviting the scholarship recipient to be the guest speaker at a members’ luncheon or dinner event or to invite the teachers who attended the Shakespeare Set Free Institute to give a presentation about their experience at the Institute to the ESU members.

If your branch is only participating in one national educational program, such as the Shakespeare Competition, we encourage your program committee to investigate other national educational programs and try one or two others—you will not only add variety to your programs but also expand ESU’s Educational Outreach efforts in the local community which is a core element of the entire organization.

Strategy #2: Develop Local Educational Programs

There are many opportunities to develop educational programming at the local level and these can be relatively easy to administer and often at no cost to the branch. Some branches that have a small membership and limited funds to administer some of the National Programs can still have very successful local education-based programs which will appeal to members of all ages.

Here is one example of a local education-based program: Westminster College in Fulton, Mo. (where Winston Churchill gave his famous “Iron Curtain” speech) sponsors the Fulbright-Robertson Visiting Professor of British History each year. This British scholar not only teaches British History at the college, he or she occasionally has a travel budget available to travel around the country to give lectures on various topics, usually based on a book or thesis he or she has written for their doctoral degree.

For several years, the ESU St. Louis and the Kansas City Branches have invited this Visiting Professor of British History to give a lecture to their members and invited guests. Other than a modest honorarium, dinner and occasionally a one-night hotel expense, the total cost of hosting this distinguished speaker is minimal. "If your branch is interested in this Visiting Professor Lecture Program from Westminster College, see the Appendix for contact information at Westminster College.

Cultural Programming

In order to have the diversity and variety of programming that will appeal to ESU members; branches should explore the many cultural programs in their communities that have ESU themes such as English language, British themes, Shakespeare themes, relevant historical events etc. There are many resources available to
branches to develop cultural programming. Often times, branches can participate in these programs with little or no cost to the branch.

**Strategy #3: Explore Local Performing Arts Organizations**

Scan through the Performing Arts and Entertainment activities in your city for programs that would have an ESU theme. One successful event in the Kansas City Branch was an ESU group event with the Kansas City Ballet. They performed an original ballet work inspired by Shakespeare’s *A Midsummer Night’s Dream* which included the entire ballet company, two actors and a chorus of singers. It included spoken excerpts from Shakespeare’s play, a host of familiar characters and 11 KC Ballet students. Tickets were obtained for ESU members and their guests at a discounted group rate. It was a unique, first-time ESU event to attend a KC Ballet production as a group. The Shakespeare theme of the ballet was a natural tie-in.

Another cultural event was sponsored by the Kansas City Public Library, the Heart of America Shakespeare Festival and The Bach Aria Soloists, a local ensemble of accomplished professional musicians and singers who showcase J.S. Bach’s music as well as music by his contemporaries and composers inspired by him. The program was titled, “*Play On! A Collaboration of Music and Words.*”

The concert combined music with scenes from Shakespeare's plays recited by some of the Heart of America Shakespeare Festival's talented local actors. This was a free event held in the main rotunda of the Central Branch of the KC Public Library. There was a reception prior to the concert with hors d’oeuvres. ESU members attended the event and thoroughly enjoyed this extraordinary program.

**Strategy #4: Tie-In with Local Museums and Major Exhibitions**

Monitor the programming of your local museums and other venues that bring major exhibitions to your city particularly with ESU themes. The Kansas City Union Station brought a major exhibit to Kansas City: “Princess Diana: A Celebration.” It was a tribute to Princess Diana including memorabilia from the royal wedding, photos, artifacts etc. That year, 2011, the Kansas City Branch combined the Princess Diana exhibit with its annual Queen’s Birthday Celebration and Afternoon Tea…all catered in a beautiful room at the KC Union Station. The following year, 2012, there was an ESU Group event to tour an exhibit marking the 100th anniversary of the Titanic disaster at the KC Union Station followed by a luncheon. Many local museums have traveling exhibits such as these that would tie-in with ESU themes also.

**Strategy #5: ESU Goes to the Movies**

What better way to create a fun event for members than organize an ESU Group movie night (or matinee) for ESU-themed movies. Examples of movies that fall in this category: *The Queen, The King’s Speech, The Iron Lady, Anonymous, and The Best Exotic Marigold Hotel.* After the movie, the group could meet at a nearby café to discuss the film.

**Social Programming**

**Strategy #6: Create/Participate in Social Events with Dual Programming**

Social programs have great value to a member organization such as the ESU because they bring members together in a setting that allows them to meet new members, old friends, community leaders and invited guests.

Some social occasions can serve a dual purpose; for example, each year in early January the Kansas City Branch hosts an ESU Holiday Brunch held at an award-winning restaurant. This is primarily a social event but we reflect back on the previous year’s ESU activities and programs. And, because many members are in attendance, it’s a perfect opportunity to hold our ESU Annual Meeting of election of officers which only takes a
few minutes prior to the start of the brunch. The ESU Holiday Brunch is a fun occasion and members look forward to this annual social gathering.

Of course, many branches celebrate the Queen’s Birthday with an Afternoon Tea social event which is very popular with members. Depending on planned activities at the Tea, the Queen’s Tea event could have a dual program strategy. For example, if the branch has a trivia contest with donated prizes as part of the event, there could be educational elements with the trivia questions that members and guests would enjoy.

Another social event that Kansas City members enjoy attending is the annual British Faire which is an all-day event sponsored by the Daughters of the British Empire as one of their fundraisers. It draws thousands during the day-long event. There are British items for sale including specialty foods, crafts, Celtic and Scottish goods, there is entertainment including a bagpiper and Highland and Celtic dancers, kids’ activities, face painting, British cars, a visit from the Renaissance Queen and her court and, of course, a traditional English Afternoon tea. The ESU has had an informational table at this event for several years and this event alone has attracted new members. ESU members enjoy attending the British Faire not only for all the festivities but the numerous British-themed events bring an educational component to the program.

Each year Kansas City Branch members attend a social event called “Taking Tea with Shakespeare & Friends.” This is a joint program with local theatre groups and The Daughters of the British Empire. This event is held in April each year in honor of Shakespeare’s birthday. Not only is a formal English afternoon tea served but during the tea, a local theatre group presents selected scenes from Shakespeare’s plays. Music is also provided by a local high school chamber music group. Arriving guests are greeted with live music, Highland dancing and displays of the sponsoring groups. A silent auction, raffles and door prizes add to the ambience of the afternoon. ESU members enjoy the dual social and cultural programming of this event.

In an effort to shore up and improve attendance at events, the Monmouth, NJ Branch experimented with two social programs:

- **Ice Cream Social:** Instead of having the usual Afternoon Tea following their Shakespeare Competition, the branch decided to have an Ice Cream Social instead. The response was good and generated interest in creating alternative programs instead of the standard programs used year after year.

- **A unique event called “June Gem”** celebrated the anniversary of Pride and Prejudice and Jane Austen. A branch member who is an appraiser and gemologist volunteered that, for the price of admission, she would appraise one piece of fine jewelry. The response was great. The branch held a Fashion (costume) Jewelry sale and made about $200 from items donated by branch board members. The Gemologist member gave a short talk about jewelry of the time of Jane Austen and mentioned the ring purchased by the American Idol winner which belonged to Jane Austen. This is a great example of Social and Educational dual programming.

**Programming with Co-Sponsors**

A very effective approach to successful programming techniques is to find partners for co-sponsored events. There are many advantages in working with co-sponsors. Cost sharing is one of the biggest benefits. Sometimes, if the ESU Branch offers its marketing and publicity resources for the event, the co-sponsor may be willing to cover other costs such as the cost of the food for a reception before the start of a lecture. Co-sponsors may be able to provide the venue or auditorium for the event at no cost to the ESU. This often would include audio-visual equipment. Suggestions for co-sponsors:
**Strategy #7: Co-Sponsor with Local Public Libraries**

Libraries are often one of the best co-sponsor resources available in virtually all communities. They like working with local community organizations and often seek out these groups to partner with programs that would appeal to the public. Contact your local library and get on their mailing list of activities, lectures and special events they have scheduled and look for ESU-themed events. Some libraries book these kinds of events many months in advance and it’s often possible to piggy-back on certain events that have ESU themes—Shakespeare, British authors, English-language topics, etc.

Contact the person in charge of booking events at the library and negotiate a co-sponsorship with the ESU. In addition, most libraries offer their facilities, meeting rooms, auditoriums, audio-visual aids etc. free of charge.

The Kansas City Branch’s Shakespeare Competition is co-sponsored with the Kansas City Public Library. The library provides a very modern auditorium for the Competition at no cost to the branch. They also assist with the marketing and promotion of the event using the library’s website and monthly mailers. Even without a co-sponsorship of a specific event, the KC Branch has organized ESU group events in conjunction with library events. The Bach Aria Soloists program mentioned in Cultural Programming above is one example of this.

Two years ago, the Kansas City Branch co-sponsored with the Kansas City Public Library a special one-act musical play titled, "Beatrix Potter, Her Life and Legacy." This musical re-enactment of Beatrix Potter’s life followed Beatrix as a lonely child in Victorian England to the world renowned author and illustrator of many children’s books including the famous "The Tale of Peter Rabbit." Beatrix Potter was performed by Stephanie Goodman who received her BFA degree in performance from the University of Florida and a Masters of Fine Arts in dramatic performance from the University of Cincinnati College Conservatory of Music. This educational program was well-suited for both adults and children. The ESU’s financial contribution to this co-sponsorship was minimal and the large audience resulted in very good exposure for the ESU.

**Strategy #8: Co-Sponsor with Organizations that Schedule Lectures for Members**

One of the largest organizations in this category is Rotary International or better known as Rotary Clubs. There are more than 32,000 Rotary Clubs worldwide and have clubs in virtually every mid-sized or larger city in the U.S. The primary purpose of the organization is to bring together business and professional leaders in order to provide humanitarian services, encourage high ethical standards in all vocations, and help build goodwill and peace in the world. It is a secular organization open to all persons regardless of race, color, creed, religion, gender, or political preference. Rotarians usually meet once a month at a luncheon or dinner and host a guest speaker on a wide range of topics—some are business-related topics but occasionally they will have international speakers visiting a city to give a presentation at a Rotary Club function.

Occasionally, ESU members might know a Rotary Club member or even belong to the local Rotary Club. Otherwise, try contacting your local Rotary Club and speak to the individual who books speakers for their luncheons and dinners. Offer the ESU as a co-sponsor to one of their events or vice versa—ask them to co-sponsor one of our ESU events such as an Evelyn Wrench Lecture. They may share their list of speaker contacts with you which could be an invaluable resource for ESU programming.

**Strategy #9: Co-Sponsor with Local International Organizations**

Many cities have international organizations represented locally. Obviously, consulates in your city are excellent resources for programming ideas. Consulates are like mini-Embassies in which the consulate general is a representative of the Embassy of their country outside of the capital city. For example, The British Embassy for the U.S. is located in Washington D.C. and the British Embassy has local consulates in many cities throughout the U.S. If your city has a consulate representing the U.K., Australia or any of the 50 countries...
where there is an ESU, you could contact them for possible programming ideas including co-sponsorships. Consulates do like to work with local organizations to promote their country.

There are other organizations that host speakers. Research these organizations in your city. In Kansas City, the International Relations Council (IRC) brings in prominent speakers for its members and the ESU has co-sponsored an event with them in the past. The IRC also will post on their website events of other organizations that would have interest to their members and the ESU has had our events listed on their website.

**Strategy #10: Co-Sponsor or Participate with Daughters of the British Empire (DBE) Events**

The DBE is a charitable, non-profit, non-political, non-sectarian, voluntary organization of the American Society of Women of British or Commonwealth heritage. Many ESU Branches have members who are also members of the DBE. If you don’t have a DBE member, the various local chapters can be contacted for information on their local charitable activities. Many U.S. cities have multiple DBE chapters. In the Kansas City metro area alone, there are six chapters. Each chapter sponsors events for their charity drives. The Kansas City ESU branch participates in two DBE fund raisers each year—The British Faire and Taking Tea with Shakespeare. We don’t co-sponsor events with them; rather we simply participate in the event. The ESU maintains an information table at the British Faire and ESU purchases tickets for the Taking Tea with Shakespeare event—both events were previously mentioned in this report. It is very likely that you could find a local DBE chapter that would like to co-sponsor an ESU event.

**Strategy #11: Co-Sponsor with Other ESU Branches**

In regions of the country where there are two ESU Branches relatively close together, include both ESU Branches in the co-sponsored event. Both branches benefit from the co-sponsorship and costs associated with the event are cut in half for each branch. Also Programming Committees from both branches can work together in organizing the event, thus reducing the workload on each branch. If the two branches are located where the venue of the event could be located midway between the two branches, it would increase the chances of more members from each branch attending the event. For contact information for Branches in your area, visit the [Branch Directory](#) section of the ESU website.

**Miscellaneous Programming Ideas**

**Strategy #12: Survey Branch Members for Selected Talent**

Do any of your members have talents or resources that could form the basis of an ESU program? One of Kansas City’s members (and board member) is a retired high school drama teacher and has written and directed his own play and directed plays of other playwrights since retiring. He directed William Inge’s *Bus Stop* and we had an ESU Group event to see the play. As far as member resources, if you have high school teachers in your membership, they are undoubtedly the best resources for education-based programming ideas such as debate, theatre, or language-related programs.

**Strategy #13: Think Like a Twenty-Something**

Try to think of programming ideas “outside the box” particularly when we are trying to add a younger demographic to our membership base. Think like a twenty-something…what types of programs would they like to participate in and attend? Can’t think of any? Why not ask them what they would like? These young people should at least be familiar with the ESU organization, its Mission Statement and some of the national programs that are already being offered, and then let them brainstorm ideas for programs that would appeal to their age demographic. It’s likely that whatever they suggest, they will think of programs that older members would enjoy too but were just never even considered as possible programs.
4. Educational Outreach Programs

- Introduction:
- Strategies for Programs:
- National Shakespeare Competition:
- Middle School Debate Program:
- BUSS and Walter Hines Page:
- Shakespeare Set Free:
- English In Action:

**Introduction**

THE HEART OF THE MATTER…..

The ESU Educational Outreach Programs are the heart of what we do! They support our mission. These programs endeavor to satisfy the needs of the students and educators as well as provide our members with the ability to participate actively to fulfill our mission. The reality is the somewhat limited involvement in these programs by some branches and members. Growing ESU branch programs is a win-win for the recipients and ESU members. Our programs are “hands-on” in that members organize them and carry them out. They get to see the results: delight on the faces of winners, appreciation on the part of teachers, and gratitude on the part of school officials. The expansion of these programs is critical to the effective functioning of branches in the other areas of Task Force Strategies: Membership, Programming, Communications, Fundraising and Publicity.

These Educational Outreach programs provide prospective members with opportunities to provide valuable services to their communities. Branch involvement in programs that impact high school and middle school students as well as teachers should interest educators at all levels. ESU can provide that margin of excellence to students and teachers in their development that can be life-changing. The National Office, working in concert with the branches, promotes these programs and their possibilities to communities across the country.

**Member activities in the ESU’s national Branches fulfill the ESU mission locally through a variety of educational and cultural programs and activities.**

The ESU Branches are the local delivery system of the ESU mission through their programs. The committed volunteers dedicated to undertaking the educational and cultural functions of the branch are invaluable in bringing the mission of the ESU to fruition.

The ESU Branches dispense some $450,000 in educational funding annually.

- 59 branches participated in the ESU National Shakespeare Competition;
- 18 branches provided scholarships for 35 British University Summer School scholars;
- 8 branches held Shakespeare Set Free institutes for teachers;
- 15 branches hosted foreign educators through the Walter Hines Page program;
- 8 branches administer English in Action sessions.

**The National Shakespeare Competition**

*All the World’s a Stage…..for students in 59 branch communities that sponsor the Shakespeare Competition each spring.*
The strategies below came out of surveys of volunteers directing the Shakespeare Competition. However, many of them are applicable for other ESU branch programs as branches reach out to school systems and organizations in the community for participation and support.

Strategies that work for branches that have successful programs: Here are some quotes:

- For the past several years the winner of the Boston Competition has given his/her monologue and sonnet at the June Garden Party. This has helped promote the competition to members and friends.
- I love that we give gifts as well as acknowledgement to the teachers of these students.
- We affiliate ourselves with a local professional theater with a staff of professional teaching artists. Start in September. Email is the best way to contact teachers.
- We paid to have a You Tube video made of our competition. It was set to music with titles interspersed to indicate emotional content. Everyone liked.
- Having an honorary chairperson has provided interest and excitement...e.g. 'Michael York, June Lockhart, Eric Braeden.
- Our workshop for students held a few days prior to the competition was led by a local university professor who was a source of valuable presentation advice. This year we offered a warm-up session immediately before the competition.
- I have expanded our competition by contacting school superintendents to reach prospective teachers. I am planning to contact a few more teachers before next year's competition. The best aspect of our competition is our association with the American Shakespeare Center and the Blackfriars Playhouse in Staunton, VA.
- We make a special effort to invite parents, siblings, grandmothers to the event. It makes for a lively audience.
- Holding the competition on Saturday morning worked well because it allowed more supporters to attend. We served cookies and soft drinks.
- It is really important to coordinate with a local entity or organization. If it had not been for Ohio State and with little help from ESU members, we would not have been able to hold the competition.
- Having a nice lunch and offering teacher gifts really keeps people coming back and keeps them emotionally connected to the event.
- We do lots of PR. Use Social media.

Successful Strategies for the Connecting with the Community

Choose the best method to identify, engage and celebrate your local educational community. We find the most successful branches have strong and diverse ties in their communities. They think creatively and find ways to partner not only on our Education programs but with other programmatic events throughout the year.

Some commonly stated How-To tips from branches nationwide:

1. Start outreach in the late summer/early fall (including Superintendents, Principals, Assistant Principals, department chairs, Curriculum Coordinators, etc.)
2. Contact Charter Schools--this is relatively new and a way "in" to reaching underserved populations. Charter Schools traditionally have less bureaucracy.
3. Constant contact is key (one email is not going to do the trick)--use email and social media. (Snail mail is not worth the time and cost)
4. Use local educators as volunteers (retired teachers as well as BUSS, SSF or Competition teachers if applicable)
5. Attend in-school competitions, local conferences, etc. (i.e. face-to face time with teachers and administrators)
6. Don't forget the teachers; always recognize them in some way (awards, certificates, thank you notes, etc.)

7. Stay in touch! Make it more than a one-time event. Plan a workshop in the fall or winter, before the Competition. This can piggy-back on SSF or your BUSS scholars. Invite the teachers to ESU events—even if they don't participate, you stay on their "radar."

8. Use your branch website. Teachers WILL look here for information. If you do not update it, your event will be quickly dismissed as being irrelevant. This is also a place to celebrate the schools and teachers. Make a list of participating schools and teachers here. Post the story of your branch winner.

9. Send out the Shakespeare press release. You and your membership are the best contacts to local press—and many local papers and website will "publish" the press release verbatim.

10. Partner, partner, partner. Collaborate with a local theater--best is a local Shakespeare company. You will become part of their educational outreach and they can assist with venue and publicity.

What is Success?

ESU Charlottesville, Virginia, had a national winner the second year of its program! Quality does not necessarily reside in size. Small programs can be very successful with strong member involvement.

Wingate University, Charlotte NC Area. One of the largest and most successful Shakespeare competitions is at Wingate University. The program, conducted by the English Department, was started in 1984. It has grown from 30-40 students to approximately 300-350 high-school and middle-school students from Mecklenburg and Union counties. Students from a range of cultural backgrounds are included, with the goal of increasing understanding of Shakespeare’s poetry among students who would not otherwise be exposed to spoken Shakespeare. For students from any background who are reticent to engage in recitation, the contest opens us a whole new world of artistic expression.

Sponsored by ESU and Wingate University, over 100 Wingate students and faculty members volunteer to put on the competition. Faculty from UNC-Charlotte and Winthrop University as well as other schools judge the final round. The public is invited to attend. And, the leader and organizer is a former Shakespeare competition participant who benefitted from the experience locally and in New York. She now teaches Shakespeare at Wingate College. ESU programs have impact!

New York has doubled its size in the last three years to over 80 schools and produced the winner in 2013. Reasons for the increase: ongoing electronic communication with the teachers, personal communications whenever possible (we attend a few school competitions as well), yearly updating of outreach list by internet research; using the branch website to post all information and forms, the development of a relationship with the Director of Theater Arts for the NYC schools, using their means of information distribution, and the summer Shakespeare Set Free program. SSF teachers account for ¼ of the Competition teachers. Additionally, SSF teachers who receive scholarships are required to participate in the Competition.

The Education Department stays actively involved in running programs in New York City as a means to pilot and learn "best practices" in the field of education.

Connections have been made with other Shakespeare and theater educators across the city to promote the teaching of Shakespeare and cross-promote our programs. Last year (2012) there was an afterschool orientation workshop in partnership with the Morgan Library and Museum. Alumni of the Shakespeare Set Free program ran 20-minute workshops on incorporating monologues into the classroom.

Greensboro NC has a history of collaboration with local businesses. It also takes advantage of the proximity of the Shakespeare Festival’s Spirit Center at High Point University. Seventeen schools participate. Prizes are awarded to each school winner and teacher ($50). The first place winner received $500, second place $300, and
$200 for third. Support from members underwrites the lunch for students and parents, which feature a lecture by a Shakespeare scholar.

**Establishing Relationships**

Getting to know key people in your community is vital to good programming. There are strategies outlined in the Communications Section. Some of the ideas listed above will work for other ESU Branch programs. Increasingly, the ESUUS website is becoming important to non-members who want to know what kind of organization we are. Branch members looking for program ideas are checking each other’s websites. Prospective members look on branch websites before deciding to join. **UP-TO-DATE WEBSITES ARE CRITICAL TO BRANCH SUCCESS.** Electronic and social media are the main means of communication among young professional and business people.

Nothing substitutes for personal contact when building networks among educators in schools that may sponsor a Shakespeare competition or participate in a middle school debate program.

The ESU Monmouth County debate program is a good example. This program is now run largely by the teacher participants from a variety of schools—urban/suburban; charter, public, parochial and independent. A middle school teacher serves as the Debate League President, organizing all school-based aspects of the program. The ESU is the fiscal agent—invoicing the schools, ordering trophies and supplies and paying honoraria to Debate Tournament Directors. The ESU also helps with outreach to new schools, maintains the website for the program, organizes free professional development days and serves as liaison with Claremont McKenna College’s Middle School Public Debate Program.

Two branches which participated in the trial middle school debate program, Columbus, Ohio, and Sandhills, NC have continued their programs, using local resources. In the case of the Sandhills, teachers and students from all schools in Moore County participate each year. The program has the full endorsement of the Superintendent of Schools, and at least one of the County Commissioners participates in the awards ceremony each year. ESU is recognized as an important partner with the Moore County school system.

**Scholarship Changes Lives**

Fifty scholars experienced the summer of a lifetime through the British University Summer School program (BUSS) and the Walter Hines Page program. Eighteen branches sponsored 35 BUSS scholars and foreign educators were hosted by 15 branches. Funding for these programs comes from a variety of sources: member contributions, endowments in a few branches, fund raisers (See the section on Fundraising), and corporate sponsors.

Personal involvement of ESU members with school officials to explicate the program, to identify talent and to reward excellent teaching leads to success for both the school community and ESU Branches. **Annual support of the BUSS program establishes an on-going relationship with scholars who return to the community energized teachers and contributors to ESU programs.** Here are two successful examples.

Since 1957, 128 Denver-area teachers have studied in England. Since 1957. **ESU Denver** consistently sends BUSS scholars (recently 2-4 scholars/summer) who then become actively involved in the branch by promoting and running BUSS, assisting with Shakespeare Competition, as well as becoming members and attending programming.

**Central Florida** has a high-quality selection process for the coveted award. It starts with applications from teachers in Orange, Seminole, and Osceola Counties. Teachers with four years of teaching submit credentials including curriculum vitae, official college transcripts, one-page essays relating the summer program to their classroom teaching and letters of recommendation from school administrators. Teachers must express their
intent to remain in the classroom three years in Central Florida. The Education Committee selects the teachers who will be invited to an interview session held in late January. The Committee then names up to five teachers as the BUSS scholars, with each receiving a $6,000 grant that will cover airfare, tuition, residence, board, and some incidental expenses. The future scholars are honored at an award reception in February hosted by the branch. Following their summer abroad, they present a planned program based on their experiences, scheduled for the following fall.

**ESU and the Folger Shakespeare Library Help Teachers Teach... thirty at a time**

An excellent way to establish a win-win between an ESU Branch and local schools is to offer a way for classroom teachers to improve their teaching of Shakespeare, required in many high schools, while receiving professional development credit for participating in the Shakespeare Set Free Institute. SSF provides an opportunity for an ESU Branch to forge relationships with local colleges which can offer facilities and faculty to supplement faculty from the Folger Library. The thirty teachers in an institute then become ambassadors to future participants. In some cases, lasting relationships, both personal and institutional, are developed through this program.

**Look at the strategy used in Oklahoma City:** The ESU Branch offers the program at no cost to in-state residents. (Teachers pay $25 which is refunded upon 2 day attendance.) Branch members feel this is very important in the state of Oklahoma where teachers are at the low end of the national pay scale and few are reimbursed for professional development. The branch partners with Oklahoma Shakespeare in the Park that provides marketing reach for the Institute. This is a win-win. Shakespeare Set Free is a superb educational program for incumbent teachers. Oklahoma Shakespeare now uses as its own educational outreach.

**Consider how the New York Branch reaches urban teachers.** It offers full scholarships to 5 New York City Public school teachers. In return they must participate in the Shakespeare Competition (if they are HS teachers) and present lesson plans at a teacher workshop. Urban public school teachers are the hardest to reach, and least likely to be reimbursed by their schools. Without the scholarship, they would not attend and ESU would not be able to reach their students.

**Think of What You Can Do:** These kinds of programs require fundraising by branches. There are many ways to engage members in creative strategies that fit local environments. Think about how other organizations fund their programs. Are there other community groups that might co-sponsor participants? A little imagination can make a big difference in classroom performance and in the pleasure teachers have in teaching Shakespeare. The pay-off is big. Think of the multiplier effect it can have.

**Global Understanding, a Central Mission**

Where better to foster cross cultural exchange than through the teaching of English to people new to the US in the ESU English in Action program. While only a handful of branches have these programs, even though the program is more than 50 years old, it is a natural for branches with universities serving large numbers of foreign graduate students and teaching assistants. If your branch is in a university town, consider starting an EIA program. Contact one of the branches which offer one and learn how it functions. Take Columbus, Ohio, for example:

Volunteers are ESU members and friends. Students are Ohio State University visiting scholars, most of whom are doctoral candidates or postdocs doing research at OSU. What they need most is help with their English conversational and listening skills. Many of them are doing cancer research or other lab work. The majority of the visiting scholars are from China, Japan or South Korea. Since most of their lab mates are also from these countries, they speak their home language even at work. They have few opportunities to speak English. Each volunteer tries to help his or her scholar with questions about the culture issues of day-to-day living.
The program is coordinated with OSU's Office of International Affairs. It recruits the visiting scholars via sending out recruitment emails. While OSU does a good job of taking care of its foreign undergrad students, the visiting scholars fall through the cracks. Volunteers also meet with the scholars’ spouses. ESU fills an important gap in meeting the needs of a special population.

**Helping Each Other**

The Best Practices enumerated here are only some of those found in the 60+ ESU Branches. These examples and strategies are listed to encourage branch members to consult with each other and learn from each other.

Call and email colleagues to get ideas on What and How To.

Add your own successes to this inventory. The more good practices that are shared, the more success in every branch.

ESU educational programs offer life-changing events for many teachers and students. More is possible with just a few more “hands on” the job and a few more dollars in the treasury. No organization has a more appropriate mission for our times. We can make great things happen.
5. Fundraising Strategies

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**Introduction**

ESU Branches vary in their access to financial resources. Some survive primarily on the dues of members, occasionally sponsoring a fundraiser to support a specific cause. Other branches benefit from funds endowed by previous or current members. Usually those endowment funds are for a specific purpose. Still others have considerable discretionary reserve accounts which contribute to robust speaker programs and/or generous support for scholarships.

To stay healthy, all branches need to engage in fundraising of some kind. There are many options available, depending upon location, financial capability within the branch, and the commitment of volunteers to initiate a program.

The purpose of this section is to share some of the practices of selected branches and to stimulate your thinking about possibilities that fit branch capability and needs. Newly available on the ESU website under the heading Branch Resources is a How-To manual on fundraising. The manual contains fundraising guidelines, sample documents, advice about tax deductibility, and suggestions for the kinds of events that are common. This is NEW and HELPFUL!

**Looking First at Ourselves**

Outside organizations are not interested in helping groups that don’t help themselves. The first place to begin securing financial commitments and donations for projects is the branch membership itself. A frequently used approach is to establish a fund and request contributions either by mail or in person at a regular meeting. Usually, a brochure is developed to outline the project, giving reasons to support it. Additionally, some branches set up categories for annual giving, e.g. Shakespeare Initiatives ranging from $500 to $5000 or endowing a Set Free Institute for teachers. There are also opportunities to establish endowments. The Indianapolis Branch has developed categories of gift opportunities ranging from $1500 to $100,000. See the Appendix for the list. Also in the Appendix is a sample Donor Intent Form used by the Indianapolis Branch.

The National Patron program is an obvious way to help the branch and the total organization. It offers an easy mechanism to attract gifts which can be easily repeated annually. The minimum amount is $300, ranging up to $25,000 and above. National Patrons have the option to designate up to 50% of their gift to their local branch. The program connects the Patron to both the branch and to the larger ESU. Local recognition of National Patrons is an important part of the process. National Patrons receive benefits in increasing levels corresponding to their giving level as well as recognition in the annual report and at national and regional events. By encouraging members to become National Patrons, ESU Branches benefit from this win-win opportunity.

Annual membership dues support approximately 10% of the national operation. It is the generosity of our Patrons, along with an endowment, that funds the remainder of national operating expenses. The Patron
program demonstrates the partnership in shared values, expressed through the ESU mission, and will insure, over time, ESU’s place in contributing in a positive way to an ever changing global community.

**Make Fundraising Fun**

Have a party!

Look at what happened in Greensboro, North Carolina. Here’s the story in their own words. “When can a party become a successful fundraiser? Greensboro Branch managed to do that with a February 2013 Mardi Gras Party that was both. We chose to have the party in the home of one of our member couples who own an historic stone home in Greensboro. Decorations were masks, beads, and brightly colored scarves.

Our branch charges the members for most meetings, but the price varies and depends upon the cost of the wine and the meal. The Mardi Gras Party was a wine and covered dish dinner with the traditional King and Queen's cake for desert. One of our members donated the cake. The amount we charged for the dinner, $28.00 per person, was a donation to our project fund that finances our Shakespeare Competition and Summer Teacher's Scholarships.

The members of our executive board staged a silent auction donating many lovely and desirable items. No white elephants appeared on the silent auction table! One of our board members planned the auction, posted the minimum opening bids, set up the table with “bid sheets” and pencils, and kept track of the time so members were aware of how long they had before the bidding closed. It was great fun with a lot of last minute competitive bidding. We received $712.00 from the silent auction.

Short appearances by our last year's Shakespeare Competition winner and the winner of our Summer Study Teacher's Scholarship added to the overall excitement of the evening.

We had so much fun that we are already beginning planning for a repeat of our Mardi Gras Party next year. This was our first one and we have many ideas to help make next year's Mardi Gras bigger and better. After expenses our net total was $1925.00.”

**Christmas is a Time for Giving**

For several years, the Sandhills (Pinehurst) North Carolina Branch has celebrated Christmas, with, of course, the usual toasts but recently with auctions as well. Auctions can be combined with any number of special events, e.g. a golf tournament, a decorated Christmas Tree sale, a rummage sale. In the Sandhills, it went like this:

**ESU Christmas FundRaizer:** There is no greater need than to raise funds for the various activities in which our ESU invests; Shakespeare Competition, Middle School Debate, BUSS Scholarships, recognition of superb students and teachers at each of our meetings. Those programs not only take many man/woman hours to do but they all need money!

One of the things the Sandhills Branch has done is to single out the Month of December as a Holiday time. We have, for the last several years done a couple of approaches: a speaker event and a party event.

The speaker event had a twist: we started out with Port, moved to Bourbon and then Wines and there is a good chance we will cascade to Scotch. Last year we took a break and had a lovely, old fashioned dinner dance.

The title of all of these events is Holiday Spirits, adaptable for many uses as you can see. We held the tastings in the afternoon, with specifically developed menus to compliment the spirit involved.
At the dinner dance we had a wonderful 5 piece band and singer from our large pool of local talent...but local in geography but also good enough for NYC! We are lucky to have special talent to draw from.

The approach to the fundraising is two-fold:

The events are special and we charge a little more per person. Part of that is to meet the needs of the food/wine/spirit but we also try to build in $2-$5 as bonus money for the branch. We also get auction items to auction off after dinner and drinks, (after drinks is key in fundraising!) We have had the following types of items donated:

- Items provided by Speakers (i.e. special items from spirits or wine producers, Jackets from Jack Daniels, special bottles of limited editions, tee shirts)
- Items provided by members: wine decanters, presentation boxes, special wines, boat rides on the lake, horse carriage rides, touring car rides, apartments/condos in other towns
- Items given by businesses: dinner for 2-4, chef for a night (a member who loves to cook) for a private dinner.

We clear several thousand dollars.”

Put Your Thinking Cap On: Here are some more ideas. Look into a trip to Africa, or other exotic land, that is done in concert with a travel group that takes a percentage of what you raise for the trip

There is no end to what you might be able to pull together, depending on your area....a dinner with a guest, someone with whom you would love to sit and talk to (someone from Monticello? Or from an embassy?)

A behind the scenes tour of a museum or any interesting space when no one else is there... A research zoo, for example. An historic site with a lecture by an outstanding historian

Do you have a condo, lake house, summer house?....auction a week or weekend there...the better the location and time, the more you can ask.

Do you have a friend who plays piano/violin really well? Auction them off for a special evening where they will play for a small group.

All of these ideas need organizing and the rules of when the auction tickets can be used and for how should be made clear upfront...you don’t want someone showing up 3 years later for a dinner!.

Local businesses will often offer something: dinner, a garden visit: get a garden designer to help with initial plan. If you know a potter, maybe a special piece can be made.

One branch is fortunate to have as a member a professional auctioneer. Other members demonstrate the goods, as it were: excited members, who will show the articles, wear the helmets, jackets or pass around the items with such glee and excitement you want to bid on things you don’t need.

The more fun and excitement you generate the better it goes.

Add a cheap raffle ($1-2 per ticket) for good items like dinner for 2 at some of the restaurants in town....something people will give a couple of bucks for and will hope to have their number pulled but are unlikely to bid high on. It usually brings in a $100 or more. Do it towards the end; it keeps them in their seats.
At Christmas, have Santa come in and bring his bag to Collect—not give—presents of money. In the Sandhills these funds are used to make awards to outstanding students and teachers invited to each of the dinner events. Each student and each teacher receives a gift certificate to the local bookstore.

It is not difficult to raise in excess of $2,000 to $3,000 depending on the year, the number of folks and the enthusiasm of the crew running it. If members know this is part of the Christmas party many will choose to participate.

Making fundraising events an annual affair keeps the money coming in for the educational projects.

**Memorial Gifts**

Several branches have established memorial funds so that members can make donations in memory of a deceased friend or other branch member.

The ESU Nashville branch has such a program. It invites members to consider memorial gifts in the name of deceased members who were prominent in the branch and the local community, if the family consents. Gifts are, of course, tax-deductible. Such gifts can play an important role in funding a branch’s programs.

If the branch publishes a newsletter, that is the ideal means by which the invitation can be made. However, a letter on branch letterhead may be just as effective. It may depend on whether the branch publishes a newsletter and, if it does, when the next issue is due. Timing is everything.

The invitation is a public service, as many members have stopped subscribing to their local newspaper.

The invitation to consider a memorial gift is not an obituary in the classic sense. Rather, the invitation is an opportunity to highlight the deceased member’s involvement in the ESU. A photograph should accompany the invitation, if possible.

Branches that raise money by this means achieve greater success if they designate contributions to a specific fund, such as the “education fund.” After the death several years ago of a prominent member, the Nashville Branch raised enough money for its “education fund” to finance a BUSS scholarship.

Another branch set up a special fund in memory of its president who was both ESU president and mayor of the community... He had used his own funds to bring outstanding speakers to ESU. The branch raised $2200 first time around to establish the fund. From time to time, members are given an opportunity to help replenish it.

**Look Outside as well as Inside**

There really is no limit to the ways in which a branch can raise money to fund at least one educational program a year. Combining member capability with individual or corporate sponsors outside ESU can often bring larger amounts into the treasury. Opening an event to the public, for which you have sought corporate sponsors, can reach a larger goal than concentrating totally on members. One branch turned the event of hosting the Wrench speaker into a major fund raiser. Richard Smarg, President of the Naples, FL Branch, sent the following information regarding their very successful fundraiser:

“The key to a decent fundraiser is a good speaker and the Evelyn Wrench speakers are priced so well that even more of the dollars contributed go to the bottom line. Getting at least three corporate or member “sponsors” for the event is usually a nice foundation. Make it clear on the invites who they are. Recognize the major contributors during the event. It’s all about them! Asking for $1,000 to $5,000 checks will usually result in you collecting at least $7,500 total from three sponsors (or more). Price the tickets so that you make at least $25 on
everyone attending. Finally, ask the board members to help by covering the cost of the various components of the event (for example $500 for adv., $700 for the flowers, $250 for the speaker’s hotel accommodations, $800 for the airfare (if applicable), $900 for the cocktails, $600 for the table wine, etc.). In the end, you might get all of the incidental expenses covered and only have to pay for the meals. By the time you’re done, you should net $10,000 to $15,000. This year we were able to net more than $30,000 on our Churchill Dinner”.

Location, Location, Location. There is only one national capital and there is a lively ESU Branch there. The newly elected president saw immediately the need to garner funds for the treasury to keep the branch afloat. What better event to have in Washington, D.C. than an embassy reception! Here is Graham Down’s report:

“Faced with a significant short fall, the Washington Branch made every effort to stage an effective spring garden party, which had traditionally taken place at the British Embassy. Jolted by being refused, the branch turned to staff in the Indian Embassy for help and they were willing to host this annual event. It could not have been a more felicitous arrangement. We had 125 guests to the Ambassador's private residence, an historic house and a magnificent setting. To our amazement, we literally had to turn people away. The Ambassador spoke thoughtfully and convincingly about the power of the English language as a unifying force in India's multi-lingual society. At the close of the day, we were heartened to find that we had cleared nearly $20,000. We are indebted to the National Office for their willingness to advertise this occasion to other branches.”

Are there consulates in your area? Are their corporate executives of major companies (e.g. Coca-Cola)? Are their major historic homes that can be opened for fundraisers? Almost every city and town has something special. Look for it. Team up with the host or a co-sponsor.

**Why not search for Institutional Funding in your Community?**

ESU Branches can also seek funding from community foundations, local family foundations, corporations and other organizations in their city/county. Keep in mind that most organizations and corporations work with an annual budget for charitable giving and require applications months in advance.

Funders will usually require the submission of a **501 (c) (3) letter of determination**—which confirms that the ESU is a non-profit organization. There is one 501 (c) (3) letter for all ESU Branches See the Appendix for more How To information on outside funding possibilities.

**Corporate Possibilities.**

Many corporations restrict their funding to local organizations/places where they have facilities. A number of corporations are now following the trend of matching their employees’ gifts to charities rather than accepting requests for funding. Be sure to encourage your members to find out if their current employer or the company they retired from has as matching gift program.

Some local and national corporations are strictly looking for something to “plaster their name on” such as walk/run events—if they will not receive public exposure through a contribution/sponsorship, they will not be interested. Check the corporation’s website for information about their policy which is often under “Community Outreach” or “Community Investment”.

Some corporations’ human resources departments coordinate employee volunteer programs and an opportunity for English-in-Action may be considered. They may also have free space to hold the classes.

**Community Foundations:** These are independent registered philanthropic institutions designed to pool donations into a coordinated investment and grant making facility dedicated primarily to the social improvement of a geographically defined territory, typically a city or administrative area (county/region).
Individual donors direct their community foundation to disburse money to their chosen nonprofits and if your branch is not on file with the foundation they may request information and/or specific documentation before issuing a grant.

To get started, visit the website of your community foundation and see if they have a list of local approved charities—if your branch is not on the list find out how to apply. You may also be able to visit the community foundation and talk with someone about funding opportunities. Be prepared with literature about the ESU, your latest 990 and a budget for the project for which you are seeking funds.

**Family Foundations:** Many local family foundations prefer to support organizations in their region and may have a particular cause to which most of their funding is given such as education or the arts. **The key to obtaining family foundation funding is engaging/knowing someone associated with the foundation who can “open the door” for you to obtain funding.** “Cold” written solicitations sometimes work, but having/establishing a personal connection is most effective. Obtain the trustee lists of prospective foundations and see if any of your members know anyone on the lists. If a member does know a trustee, invite him/her to your Shakespeare Competition, Debate Finals or to see EIA “in action”.

In the case of both community foundations and family foundations, it is important to have done your homework. You will need good literature about ESU and about your branch. Spell out the reasons you believe they should invest in you. It is always good to have a “case” statement and, if available, a copy of your strategic plan.

See the Appendix for samples of a Case statement and strategic plan used by the Indianapolis Branch. And, of course, you will need to present a copy of your budget for the project and a copy of your 990 filing.

The ESU Branch in San Francisco has had considerable success working with foundations and other funding sources in the Bay Area. They are able to consolidate funds from several sources to maximize the funds going into scholarships or the ESU educational programs of interest to the foundation or company. Here is their story.

The **San Francisco Branch** has had a long standing relationship with a main foundation that was cultivated over several years. The branch continued to engage the participation of key decision-makers in the Branch Scholarship Program and provided annual updates regarding the Scholars. Enabling a foundation to connect with the branch process of evaluating the Scholars and to provide detailed feedback from the Scholars to the foundation provided the foundation specific evidence as to the beneficial effect of foundation resources.

Another source of a foundation donation occurred recently when a foundation was winding down. A decision was made to terminate a foundation and an SF Branch Member was on the board of that foundation. As the final disposition of the foundation resources was under review, the SF Branch Member crafted a recommendation to donate the funds to SF Branch of the ESU given the similar nature of the organization missions.

And finally, consistent annual donations have been made by affluent members. Those members are continually acknowledged for their grand support of the ESU with calls and personalized letters from the appropriate chair of the educational program or the president.

**Summary:** There are many ways to increase your resources so that your ESU Branch can make a significant impact in the community. Healthy balance sheets permit richer programs for members; and, they make possible the enrichment of the community through association with schools, teachers and students. ESU Branches have the kinds of members who can do that, both in terms of their own educational backgrounds and in terms of their talent to make things happen. GO FOR IT!
6. Governance & Succession Planning

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**Introduction**

ESU's Board of Directors sets high standards for its members, officers and directors. Implicit in this philosophy is the importance of sound corporate governance. It is the duty of the branch board of directors to serve as a prudent fiduciary for members and to oversee the management of its business. To fulfill its responsibilities and to discharge its duty, the branch board of directors should follow the procedures and standards that are set forth in the Branch Manual. These guidelines and code of conduct are modified from time to time to reflect changes in the structure of the organization.

The fundamental requirement for branch sustainability and vitality is good governance. Up-to-date bylaws are vital if boards are to function effectively. Good bylaws include provisions for the succession of the branch leadership and board.

Additionally, branches must make adequate provision for the handling of funds, whether membership dues and records, contributions, invested reserves or IRS reports.

There are documents resident on the ESU National website under Branch Resources that serve as manuals and guidelines for good governance.

**First Steps**

Each branch has its own board and the structure of the governance needs to be shaped by leadership of the branch. The overall principles of Robert's Rules of Order need to be followed yet the specific structure of the frequency of meetings, number of board members, delegation of responsibilities as well as the maintenance of the historic records need to be determined by each branch.

Ensuring the board members are engaged requires a commitment of a few core Members, ideally the president, secretary and treasurer. Given that the efforts are non-profit and volunteer, it is important to make board events enjoyable and meaningful to the participants. Be sure to:

- Establish a Consistent Meeting Time
- Ensure that Board Members Have a Specific Role
- Plan for Succession
- Identify Annual Goals

**Bylaws:** All branches should be sure that their bylaws are up to date. Additionally, all bylaw updates must be approved by the board of directors of the ESU and be on file at the National Headquarters.
If you have not examined your bylaws in the last five years, you should do so. Also, if you have made changes and/or amendments, they should be submitted to the national board of directors for approval.

Sample branch bylaws are available under Branch Resources on the ESUUS website. This will make the updating of your branch bylaws a relatively easy process.

**Prudent Financial Management:** According to ESU policy, every branch must have, in addition to a treasurer, an independent finance committee. The Branch Manual provides the following guidance: “The chair of the finance committee should be a board member other than the president and the treasurer. This committee should review the branch’s finances including its statements from financial institutions, review its 990 report prior to submission to the National Headquarters and should be the entity to which the branch board’s conflict of interest disclosure statements are sent. The committee may also operate as an investment committee charged with overseeing the branch’s investments.”

If the branch has reserve accounts or other funds invested, it should have a clearly stated investment policy. A sample policy used by the Indianapolis Branch is found in the Appendix. There should also be an endowment gift agreement executed by the donor and the treasurer acting on behalf of the branch. See sample in Appendix.

**Leadership Succession**

All too often, branch members, officers and boards focus on the present and put off matters of the future. That leads to trouble down the road. Thinking ahead and planning for leadership succession is another bedrock of a successful branch.

It is easy to forget by-law provisions. Or, it is tempting to postpone dealing with change, especially if the present leadership is doing a good job and the members are pleased with things as they are. But, change is inevitable, whether planned or not: members age or move away, officers get tired and need a break, board members come to meetings but don’t do the heavy lifting in getting new members or administering educational programs. When this happens, decline sets in and it is hard to reverse.

Every branch president and member of the board should have the following paragraph pasted to the bathroom mirror:

“An established plan for leadership succession is a vital component of any successful organization. Incoming branch directors and officers must fully understand their responsibilities in order to ensure a smooth transition from one “administration” to the next.”

Some of the things board members can do include: establishing key positions including committee chairs so that they can become active in the activities of the branch, assigning mentors to potential candidates for leadership in order to groom them for future service, developing role definitions for key leadership positions so that persons invited to assume responsibility will know what it is expected.

**Indianapolis’ Statement of Expectations.**

The following is a clear example of the job of an ESU board member. This avoids confusion at the outset and individuals who cannot fulfill these requirements are not likely to stand for election.

**THE INDIANAPOLIS BRANCH OF THE ENGLISH SPEAKING UNION OF THE UNITED STATES EXPECTATIONS FOR THE BOARD OF DIRECTORS**
The Indianapolis Branch expects each director, upon election to:

1. Attend all scheduled meetings of the board.
2. Serve on a minimum of one committee and attend its meetings.
3. Support the Annual Fund with a minimum gift of $100.
4. Give a thoughtful and meaningful gift to the Endowment Campaign.
5. Take an active role by attending monthly programs and events.
6. Demonstrate leadership by inviting potential members to join our branch.
7. Nominate and mentor new directors.
8. Consider contributing to the national organization and participating in regional and national activities.

These Expectations were written and adopted by our ESU Branch Board on January 16, 2007.

Case Studies in How Bylaws are implemented

Sandhills Branch. The Bylaws are codified in policies and practices that form the basis for board and committee functioning and for the succession of leaders from within the corps of officers and committee chairs. This is how it works.

Composition of the Board of Directors
- **The board** is composed of 21 individuals, divided into three classes and the officers. The officers include the president, vice president, secretary and treasurer.
- **The executive committee** is composed of key board members appointed to the president. The executive committee is usually composed of the president, vice president, program chairman scholarship chairman middle school debate chairman Shakespeare competition chairman, chairman of publicity and chairman of the membership. Other members are added to the executive committee as needed.

Election of Officers
- Directors are nominated by a nominating committee, appointed by the president and approved by the board. The nominating committee is composed of three members of the then current board (one of whom shall be appointed chairman) and two representatives of the general membership.
- Recommendations from the general membership to the nominating committee may be made by written petition not later than February 15. Requests of board nominations are announced in eblasts and at meetings beginning in January.
- The nominations of the nominating committee are announced to the general membership at the regular March meeting.
- The slate of officers and board members will be voted on by the membership at the April Meeting
- Elections to the board shall are three years except in filling vacancies when the member-elect shall enter the class of his predecessor.

Term Limits
- No director serving two full consecutive terms (six years) may be re-elected as a director until one year after the expiration of his second full term.
- The president with the consent of two/thirds of the board (not including the subject board member) has the ability to terminate a board member for cause

Position Descriptions
- Position descriptions are developed for all of the officers on the board and key committee heads. The position description will be described in the branch’s Procedures Manual.
- Each board member should be responsible for a committee, serve on a committee or provide a vital function (publication of the directory).
Succession Planning

- The chairperson of each chair is responsible for developing their successor.
- The vice-president is expected to become the president at the expiration of the current president’s term. This will insure an individual with adequate experience will assume this key leadership role.
- The vice-president is chosen from board members, committee members or members that have shown leadership ability and been responsible for major events or task.

The Nashville Branch – Governance

The Nashville Branch varies little from the Sandhills and Indianapolis Branches in its approach to self-governance. Bylaws are reviewed annually, usually in the fall, when the “season” begins. It is important that the Bylaws reflect what the branch is actually doing. The Bylaws are a “living” document, and the best bylaws will provide useful guidelines for almost any situation.

The immediate past president, the president, the president-elect, the secretary, and the treasurer are designated directors. The chairs of the Education, Membership, and Finance committees are appointed directors. There are twelve at-large directors, with six directors elected every other year to a four-year term. Directors may be elected to one additional term.

The board meets once a year. The board’s standing and ad hoc committees meet at regular intervals all during the year.

The executive committee acts on behalf of the board between meetings of the board. The executive committee records its minutes and sends them to the directors after it meets. The executive committee consists of the five designated directors and the three appointed directors, although the at-large directors are invited to attend the meeting.

The branch has created the office of president-elect to remove the uncertainty of succession in that office. This has allowed the president-elect adequate opportunity to prepare for the presidency.

Branch presidents have typically held high office (at the state or national level) of other service organizations. These individuals are well-versed in the governance of tax-exempt organizations, and they are very capable in managing membership organizations. Also, because they have been groomed for this office (as president-elect), very little learning is necessary.

Directors represent a cross-section of the branch and of the local community. Directors are encouraged to become National Patrons, but otherwise there is no pressure to contribute financially. However, directors must be active in branch affairs. They must be involved. At the end of their first term, their involvement in the branch will be evaluated. Election to an additional term is not a certainty.

All committees are encouraged to submit articles to the newsletter editor to show the members that the branch is well organized, is active, and is an organization that offers value to its members.

Succession of Regional Chairs

A discussion of leadership and succession cannot overlook the regional structure of ESU and the role of the regional chairperson. This section begins with a quote from the conclusion of the regional manual.

“With involved and committed regional officers and members, an effective network of communication will give the English-Speaking Union a greater ability to carry out its mission and remain viable as an organization.”
This point should be obvious to anyone familiar with an organization with a regional structure. The manual also contains a list of specific responsibilities of the regional chairpersons. And, it outlines the method for electing them and sets forth the limits of their terms. In an earlier time, the nomination and election method made sense. (See the role definition in the Appendix.)

Branch involvement through participation in regional meetings and through participating in the nomination and election process is vital to effective functioning of the regions. Branches are responsible for insuring the selection of active, strong regional chairs. This can be accomplished in several ways, achieving the intent of the process outlined in the Regional Manual.

Two examples follow:

Region IV. (North Carolina and Virginia)

Because the regional meeting usually has good representation for most or all branches, the elections are conducted as outlined in the Regional Manual. The Nominating Committee of three people meets in advance of the regional meeting to identify candidates for chair, first and second vice chairs and secretary.

The slate is presented at the spring meeting by the chair of the nominating committee. Elections for each take place there. Minutes are recorded each year by the secretary.

In Region IV, the branch representatives elect first and second vice-chairs. The first vice-chair agrees to stand for election to become the chairperson when the current chair leaves. This is equivalent to a “president-elect.”

In the meantime, the two vice-chairs and the chair plan to visit the branches during the year and participate in activities to bring branches together... This year, the second vice-chair is heading the committee to plan and host the regional meeting in March. All participate in communicating with the branches. All three encourage branches to update and maintain their websites.

Succession in Region II

Region II consists of five states (South Carolina, Georgia, Alabama, Mississippi, and Tennessee), a land mass that stretches from the Atlantic Ocean to the Mississippi River, and from Mobile Bay to the Tennessee River.

The region held a meeting in 2011, but it was lightly attended largely because of the distance to Nashville. The then-regional chair expressed a desire to step down, but a replacement was not elected. The new regional director chair was nominated and elected by the region’s delegates at the 2011 Annual Meeting in Philadelphia.

The new regional chair surveyed the region’s branches in 2012 and 2013 and, based on that communication, no regional meeting was planned. With no regional meeting to attend, the branches were encouraged to attend the 2013 Annual Meeting in Seattle.

The regional chair could not attend the 2013 Annual Meeting (because of a competing annual meeting of an organization in which he is a national officer), so he could not preside over the nomination or election of his successor in Seattle. Instead, he appointed the eight branch presidents in Region II to serve as members of an ad hoc nominating committee. He asked the branch presidents to suggest the names of any members who would be willing to serve as regional chair and had a proven track record to demonstrate their qualifications for that important office.

In the next month, the ad hoc committee submitted three names to the regional chair, with a fourth name “on hold” in the event that the first three did not advance in the process. The regional chair called the three candidates and interviewed them by telephone. One of the candidates withdrew, a second candidate was
proposed for election as an at-large director on the ESU’s board, and a third candidate agreed to be nominated for regional chair.

The regional chair circulated the name of the third candidate, together with her biographical summary, to the ad hoc nominating committee. After further discussion, the committee of branch presidents nominated the third candidate, by a vote of 7 to 0, and she will be elected regional chair by the region’s delegates at the Seattle meeting.

This process of identification, nomination, and election is quite effective. It gave every branch an opportunity to advance the candidacy of highly qualified, highly motivated members. It gave the regional chair a chance to interview candidates he had met on previous occasions and whom he already knew to be eminently qualified. It gave the branch presidents a chance to “meet” the next regional chair prior to her election. And, it gave the nominee, herself, a chance to prepare her remarks at the Seattle meeting, where she will be elected by the delegates.
7. Communication

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Introduction

“I’m a great believer that any tool that enhances communication has profound effects in terms of how people can learn from each other, and how they can achieve the kind of freedoms that they're interested in.” — Bill Gates, Founder, Microsoft

Communication, in general, is the process of transmitting ideas, thoughts, information, emotions, etc. between and among people. An organization which focuses on promoting the English language should be masters in communication; however, all organizations today are faced with tremendous communications challenges as
they try to make effective use of traditional communications tools and adapt to the new technologies that must be used to remain in the forefront of getting our message to our audience.

The ESU’s tag line, “Education. Scholarship. Understanding” represents the key elements in our Mission Statement. For our audience to have a good “understanding” of our Mission, we have to effectively communicate our message so it is clearly understood and also provide channels for feedback at all levels so our audience has a sense of feeling connected, directly or indirectly, to the organization. A “connected” audience is a hallmark of a successful organization.

For purposes of Communication in the ESU, who is our audience? Let’s break our “audience” down into two main categories: a) those inside the organization—our internal audience and, b) those outside the organization—our external audience:

Our Internal Audience:
- Branch members
- Branch officers and directors
- Regional chairs
- Headquarters officials and staff

Our External Audience:
- General public
- Educators and students who participate in ESU programs
- Business partners and sponsors who help support ESU programs
- Outside donors who provide financial support e.g., individuals, corporations and foundations providing grant funding etc.
- All media who promote the ESU and help get our message to the public e.g., newspapers, magazines, radio, TV, internet, social media, blogs etc.

It is our goal in Straight Talk to develop strategies that allow for transparent, two-way communication between these audiences.

With these two audience categories in mind, we are organizing our strategies into Internal and External Communications. It’s important to note that some of these communication strategies and tools overlap between internal and external; for example, branch websites serve both Internal and External Communications. However, the manner in which these strategies are implemented varies depending on the audience.

**Internal Communications:**

Internal communication is a lot more than people talking to one another. It's the way in which everyone gets the information they need and it means that anyone can easily get their question answered or know where to go to get answers.

There are many tools to make internal communications easier and more effective. We are focusing on the primary tools and strategies that will help branches overcome communication barriers. These are not the only effective communications strategies, by any means. This is just a start and we hope branches will use some of these ideas to improve their internal communications and submit ideas of their own that can be shared with other branches. The Appendix will have further communications tools and ideas to share.

**Strategy #1: Fully Utilizing the ESU Website for Internal Communications**
The effective use of a quality website is one of the most powerful tools an organization can use for communicating its products or services to an audience. Websites provide both internal and external communication opportunities. Initially, we will focus on the website for **Internal Communications**.

The ESU’s website had a major overhaul in 2012-2013. It not only has a completely new design for ESU’s National website but a primary objective in the overall design was to create an effective and attractive **companion website for each branch**. Your new branch website can be easily updated with branch information while carrying a uniform “look and feel” throughout the whole organization so our branding and message is consistent with the ESU’s Mission Statement and programs.

It is important that all branches take full advantage of their branch website which is one of the most powerful marketing tools available to you.

**How the ESU National Headquarters’ Website Helps Branches with Internal Communication:**

There is a wealth of information on the National website. Click here: [www.esuus.org](http://www.esuus.org). Much of the information on the National ESU website is designed to assist branch operations and facilitate media relations. Here are some highlights of some key areas of interest to branches:

- In the “About Us” tab is a detailed list of all the principles of the organization including the chairman, board of directors, past chairs & presidents, ESU staff and other information such as the History of the ESU, its Mission Statement and Vision. Review the material in “About Us” carefully as branches can use it for many purposes including press material for media relations.
- The “Programs” tab is an excellent resource which lists all of the ESU’s Outreach Programs with detailed “How to’s” that will be very helpful to your branch programs committee. This tab should be reviewed regularly by branch leaders as news stories and updates on educational programs are added continually.
- The “Events and Activities” tab lists the Ambassador Book Awards and serves as a resource for speakers in the National Speakers Program.
- Of course, the “Membership” tab is valuable for promoting the benefits of ESU membership although branches would certainly want to use the Membership tab on their own branch website for encouraging members to renew online.
- The “Branches” tab of the National website is undoubtedly the most valuable resource of all for branches. The “Branches Resources” menu has PDF file documents on General Information, Branch Materials such as Branch Operations Manual, On-line Membership Roster, some Governance policies etc., and Program Materials. Be sure to review all the material available in the “Branch Resources” tab.

**How the Branch Website Helps with Internal Communications:**

1. **Informs Branch Members of Upcoming Programs and Events**

   It is important that all branches take full advantage of their branch website which is one of the most powerful marketing tools available to you.

   All branch events and activities should be posted and kept current on your website. It’s recommended that branch events be posted at least three weeks or more in advance of the event if possible. Members are more likely to attend events if they are informed far enough in advance to add the event to their personal calendars. Eventually, current events become past events and the website serves as an archive
for those past events. It’s a helpful reference when researching past events. (See #7 re: website search tool.)

Many branches have a member or board member assigned to updating their website. It is an easy process to update and add information and photos to your website. It requires no technical expertise. To learn how to get started updating your site, contact the Branch Services Administrator at ESU Headquarters.

2. **Explain the Benefits of the Website to Members and Encourage Them to Use its Valuable Resources**

Branch leaders that acknowledge the current methods of communication are embracing their branch websites to inform and serve the members. According to one branch officer, if the ESU is about expanded communication through English, teaching members how to communicate via all digital media is within our mission—and a service to members!

Because branch websites and the National website are easily linked, members who become accustomed to reviewing their branch website will also become accustomed to seeing the National organization’s news. Branches should work at directing their members to their website and try sending members emails directing them to stories on their websites.

3. **Makes Online Membership Renewal Easy**

All branch websites have been set up with Membership information specific to your branch including your own membership categories and dues amounts. We encourage all current members to use their branch website for membership renewal. The process is easy and dues can be charged on credit or debit cards. It significantly reduces the time and effort that the branch membership chair spends processing renewals. If some members don’t have a computer or access to one for membership renewals, it is suggested that the membership chair or another member help that member with processing their renewal online using another computer.

4. **Members Can Refer their Branch Website to Potential Members**

The website is an excellent marketing resource for potential members. Current members who know someone who is interested in joining their branch can refer them or show them their branch website and in the “Membership” tab are various resources explaining the benefits of becoming an ESU member. The new member can join online or they can print out the enrollment form and mail it in if they prefer. The objective is to streamline the enrollment process for the new member. Be sure to read the “Membership” section in this *Straight Talk* manual for examples on new Membership strategies.

5. **Valuable Material on Website Available to Branch Leaders**

Did you know that every branch website has detailed information on ESU educational programs offered by that branch? That information can be used by presidents, board members, committee chairs to arm them with the most current information and to manage their educational programs. The branch website links directly to the National website so that current information is always available. Example: The BUSS program has Teacher Resources, Branch Resources, Branch Participation, In the News, etc.

6. **Your Branch Activities & Events Can be Easily Shared Throughout the Organization**

All branches have excellent, successful programming strategies and ideas. Many of these programs are unique to your city or region of the country. Some of those programs could be adapted and used by other branches. If your branch website is kept up to date with all of your programming events and
activities, it serves as a great resource to share your programming ideas with other branches. Programming chairs, in particular, should periodically visit other branch websites for programming ideas that could be used in their branches. Sometimes a unique event used in one branch could be used in many branches with little or no modification.

7. **Website Search Tool Saves Valuable Time**

As your branch website grows and compiles more and more material on programs, photos, past speakers, etc. the more valuable the website’s search engine becomes. On the top right corner of your branch website is a Search Bar. Experiment with this search tool and you will be able to find it’s very helpful to search your website’s archives as well as current material. However, if you are not maintaining your website and keeping archives, this search tool will have limited value, if any. Here is an example of how this search tool works: you know that you had a speaker a couple of years ago who was a member of the British Parliament but you can’t remember his name or which year he spoke in your branch. You can enter “British Parliament” in your website’s search engine and you will find all references to that term that are in your website. Then, you can easily find the specific reference you want and go to that archived event.

**Strategy #2: Effective use of emails**

Love it or hate it, email is the most efficient means of internal communication in an organization. The first email was sent in 1971 and in 1976, the first head of state to send an email message was Queen Elizabeth II. Email actually predates the internet and today an average of 250-300 billion emails a day are sent worldwide, although a whopping 90% are spam.

**Email vs. U.S. Mail**

No one denies that the U.S. Postal Service is in trouble. First class mail has fallen by an amazing one-third since its 2001 peak, while overall mail volume is down by almost 25%. The service lost almost $16 billion in 2012 and is now losing about $25 million per day. Cost-cutting would not have made the horse and buggy business sustainable in the dawning age of the automobile.

However, with this stalwart of communications hovering near the brink, all companies and organizations must adapt. Some branches have found that combining both U.S Mail and email is the best solution. For example, they send out a newsletter by U.S. Mail at the beginning of the season which lists all the upcoming programs then follow up with emails for reminders or more details on the events as the date of the events draws near.

**Solving Email Problems with Members:**

While that’s one strategy that can’t hurt, what do branches do when some or many members don’t have email, don’t have internet access or don’t even have a computer? What do you do when members who do have email, don’t open and read the email? What do you do when members wait a week or more to open their email? There are no easy answers. These are issues all branches are dealing with all the time.

1. **Ask a Friend for Help**—For members who have no email or access to a computer, one possible solution is to ask that member if they have a friend or family member who would be willing to accept emails on their behalf. No one likes receiving more emails, but if the member explains to the friend or relative that the emails aren’t too frequent and they are being sent by an important non-profit organization to which they belong and the email correspondence is sent for programming, membership, special announcement reasons etc., the friend or relative would be doing a great service in assisting its member. The friend or relative may be able to read the email message to the member over the phone or may be able to drop it
off when they are visiting in the near future. This may not be a practical solution in all cases but it’s worth investigating.

2. **Follow-up Phone Call**—If there are certain members who don’t read their emails or they delay reading them for a week or more, the only solution is to follow-up with a phone call immediately after the email is sent asking the member to please check their email and call back when they have read it. In some cases, after several phone calls, the member may start responding more promptly. Again, this is a somewhat delicate situation which may require a different approach with each member. The important point to get across is that emails from the ESU are not too frequent and they are important messages for the benefit of members. Explain that any other means of notifying the member is costly and labor intensive and the ESU is trying to operate as cost-effectively as possible.

3. **Initial Phone Call**—If emails through other parties are not a practical way to contact the member, some branches have resorted to calling the member with the intended communication. They try this first before the final means of contact: U.S. mail.

4. **U.S. Mail**—If the above suggestions don’t work, branches may have no choice but to resort to mailing the correspondence to the member.

5. **Ask a Member for Suggestions**—For members who fall into the categories of having no computer, no email, won’t open emails etc., try asking them for suggestions in solving this communications dilemma. If they make reasonable suggestions for solving the communication problem and it works, they will feel like they are part of the solution instead of part of the problem.

6. **Check Appendix of Straight Talk**—The primary purpose of *Straight Talk* is to establish best practices, share ideas and find solutions to problems. We have many branches throughout the U.S. and this internal communications dilemma is nothing new. Branches have been dealing with this email issue for at least 7-10 years or more. Some branches have discovered some unique approaches in dealing with this and we welcome and encourage all branches to submit their suggestions for dealing with this issue.

**Etiquette Tips for ESU Business Using Email**

Everyone knows business email is different from personal email. Listed below are some tips in using email in a business environment. These tips apply to both internal and external email communications.

1. **Keep it short and get to the point.** The long email is a thing of the past. Write concisely, with lots of white space, so as to not overwhelm the recipient. Make sure when you look at what you’re sending it doesn’t look like a burden to read – feel free to use bullet points. The person reading your email should not have to dig through several paragraphs in order to figure out what you’re asking. You should state the purpose of the email within the first two sentences. Be clear, and be up front. If you have an issue or a conflict, simply call the person involved directly.

2. **Use Subject Line Correctly.** The subject line is the window into your email and many times can determine even if your email will be opened. Many ESU Branch staff work from home where they are receiving email from many sources—both personal and business. It is important to have a short but accurate description of the subject matter of the email in the subject line. Many important business emails are filed in email folders for future reference. Without accurate subject lines, it can be very hard to find that email.

Your subject line must match the message. Never open an old email, hit Reply, and send a message that has nothing to do with the previous one. Do not hesitate to change the subject as soon as the thread or content of the email chain changes.
Finally, the Subject line should be typed in proper case. All lower case makes you look like a spammer or that you lack education. All caps also look like spam and infer an elevated tone. Save your emphasis for the content of your email.

3. **The “To” Line.** Wait to fill in the “To” email address line until you have completed the message and are ready to send it. This will keep from accidentally sending an email prematurely. This becomes trickier if you are replying to a group and you use “Reply All.” If it’s a long email and you don’t want to take a chance with sending prematurely, you can “cut” all the names in the “To” line and “paste” them down in the body of the message and when ready to send, “cut and paste” back in the “To” line. This is awkward but it works.

4. **Maintain privacy.** If you’re sending a message to a group of people and you need to protect the privacy of your list, you should use "Bcc." Even if you pull names from your contact list or have a group list with just the first and last name visible, the actual email address can sometimes be seen if you mouse over the name. Generally, it’s better etiquette to put long groups of names in the “bcc” line so the names are not visible to the recipient.

5. **Pick up the phone.** When a topic has lots of parameters that need to be explained or negotiated and will generate too many questions and confusion, don’t handle it via email. Also, email should not be used for last minute cancellations of meetings, lunches, interviews, and never for devastating news.

6. **Send or copy others only on a need to know basis.** Before you click Reply All or put names on the Cc or Bcc lines, ask yourself if all the recipients need the information in your message. If they don’t, why send it? Take time to send your messages to the right people.

7. **Beware of the "reply all."** Do not hit "reply all" unless every member on the email chain needs to know. You want to make sure that you are not sending everyone on a list your answer—whether they needed to know or not.

These are some of the more important email tips and etiquette guidelines for business use. If you have others that you want to share, please let us know and we’ll add them in the Appendix.

**Strategy #3—Newsletters**

A newsletter is a good vehicle for summarizing information for all levels of the organization. It’s a quick reference document that highlights information on national and branch programs, events, news about members, such as introducing a new member in the branch, lists of members and officers etc. Colorful graphics and photos add a lot to the readability of newsletters. Generally, newsletters are either sent electronically or are designed to be printed and mailed through the U.S. mail.

**National ESU Newsletter:**

One of the goals of improving internal communications within the ESU is to increase transparency of the activities at the National headquarters. Exciting new programs and changes to existing programs are always newsworthy. What are some of the long-range goals of our new chairman? What kind of National-level new programs is our president considering? What is National accounting working on that may help make the branch treasurer’s job easier? What better way to convey these news items than a bi-monthly National Newsletter that would be emailed to members at all levels? Regularly scheduled communications from National Headquarters to all members are essential in establishing strong ties among the chairman, the Headquarters staff and the branch members.
Branch Newsletters:

- Advantages of Electronic Newsletters
  a. Using standardized templates make these newsletters easy to compose.
  b. Or to keep it simple, newsletters can be sent using the standard, simple email format.
  c. Whether using a professional newsletter template format or a simple email message for your newsletter, graphics, photos, videos and URL links can be easily added to make the newsletter more interactive and attractive.
  d. No cost to email the newsletter to members.
  e. For members who don’t have email or the internet, the electronic newsletter can be printed out and mailed.
  f. The Appendix in *Straight Talk* has several examples of branch newsletters.

- Use of Printed Newsletters
  a. They can be mailed to members who don’t have email or internet access.
  b. They can be used as handouts to guests during an event or part of your branch material on an information table.
  c. Depending on the layout and depth of information in the newsletter, they could be designed to be used as a flyer or poster to display on community bulletin boards announcing an event or multiple events.
  d. Mailing printed newsletters to all members instead of sending electronically can get expensive and has added labor involved. While there may be an advantage that a printed newsletter may stay visible on a desk or home bulletin board longer than an electronic newsletter will in a computer, there is so much junk U.S. mail today that the mailed newsletter may have a very short life span if even opened at all. Defer to the electronic newsletter if possible.

- Use Your Branch Website as a Substitute for a Newsletter
  a. Many Branches use their website in lieu of a separate Branch Newsletter—it’s easily accessed online, even away from home on mobile devices.
  b. Branch websites, if used as designed, convey the same information as most newsletters.
  c. This avoids designing and separately preparing a newsletter to members. By concentrating on posting upcoming events on your website, members have just one source for information about Branch programs and events. The key is keeping your website current and up to date.
  d. Some Branches have been successful with supplementing their website program information with periodic email blasts that just serve as reminders of an event and direct members back to the Branch website for further details of the upcoming program or event.

Strategy #4: Meetings

Branch leaders should attend regional meetings and annual conferences to share and learn best practices for maintaining and advancing the organization. Networking with other ESU members is recognized by many as a primary benefit of belonging to the ESU, but through the regional chairs, branch officers realize that participation at meetings is an expected part of their service.

Recognizing the role of technology in meetings, Headquarters has initiated the practice of holding webinars, originally intended for working with Shakespeare Competition Coordinators and educator participants in national educational programs. But Headquarters is ready to set up online meetings for branch, regional and member groups as well. This can be coordinated through the Branch Services Administrator at Headquarters.
External Communications

External communications is any communicative effort specifically for people and organizations operating outside the ESU. Successful external communications reach out to our audience so they know and understand us better and want to be part of the organization.

Every successful nonprofit is a brand. Just think of the American Red Cross, the Salvation Army, or the March of Dimes. These great iconic nonprofits are so well branded that when you think of each of them, the very name calls up a host of associations, memories, positive feelings, and the satisfaction that you know them. Branding is about selling everything associated with our organization. The English-Speaking Union is a brand that is recognized by some, mostly in education-based circles, but needs to be expanded. For us to reach out and promote our brand of education, scholarship and understanding of the English language, all levels of the organization have to focus on the key elements that successfully communicate our mission.

For purposes of Straight Talk, our goal is to provide guidelines, enhanced tools and best practices to help branches achieve successful external communications and publicity strategies—all of which will build our brand make us more connected with our audience.

As we describe the various strategies for external communication and publicity, keep in mind our primary audiences to which these strategies apply:

- General public
- Educators and students who participate in ESU programs
- Business partners and co-sponsors who help support ESU programs
- Outside donors who provide financial support e.g., individuals, corporations and foundations providing grant funding etc.
- All media who promote the ESU and help get our message to the public e.g., newspapers, magazines, radio, TV, internet, social media, blogs etc.

Strategy #5: Fully Utilizing the ESU Website for External Communications

Whether a member of the general public, a high school teacher, a co-sponsor such as the local public library, the head of a foundation providing us a grant or your local Public TV station, all of our audiences use the internet to find information about the ESU.

In Communications Strategy #1, we focused on how the branch website helps facilitate Internal Communications. For External Communications, the branch website is the primary go-to source for all local information about the ESU for people outside the organization. If your branch website is fully utilized, all of the above audiences will have a good understanding of all aspects of your local branch. If it is not kept current or not being used at all, those audiences may look at it and wonder if we are an active part of the community. We always want to put our best foot forward and present the most attractive, positive, energetic and progressive organization to the public as we can. The local ESU Branch website is the key.

How the Branch Website Helps with External Communications:

Defines the ESU for the General Public. Someone who has never heard of the ESU can be referred to the local branch’s website and in a few minutes will know about our mission statement, the history of the local branch, past programs and activities of the branch, upcoming programs, and so much more.

1. Detailed Membership Information. Whether an outside individual was referred to the branch website by a member or if that person was just curious about membership in the ESU, the branch website is the
perfect first stop for providing that information. The branch website should have all details about membership including membership categories, an explanation of the National Patron Program, dues amounts, enrollment form, how to enroll online etc.

2. **Excellent Resource for Participants in ESU’s Educational Outreach Programs.** Whether your branch produces one or all of ESU’s Educational Outreach Programs, the local branch website has a wealth of detailed information. It shows how to implement and administer these programs internally within the branch and also provides resources for the sponsoring teachers, students and co-sponsors of these programs. Most of the resource material found in the branch website links to the National website thus keeping all of this material up to date. Additionally, branches have the ability to add customized details on these programs for local branch operational purposes.

3. **Excellent Resource for Media.** Whether the media contacts your local branch or your Program Committee contacts the media first, the branch website has most of the information needed by the media. The ESU is considering adding a specific media go-to section in websites which will facilitate the media’s access to pertinent information they need.

4. **Resource for Grant Applications and Fundraising Inquiries.** The Grant application process can be detailed and time consuming. The branch and National websites have key references that Grantors access as part of the Grant review and approval process. If the branch website is fully utilized and up to date, it will have a positive impression on the Grant issuer and will play an important role in the grant’s acceptance. Organizations, large and small, who are considering co-sponsoring fundraising events with ESU Branches, look to our branch websites for resources and information that speak to our strengths in community relations and past fundraising events by reading about the various past branch events as well as upcoming programs we offer in the community and the public in general. Again, the key is to always keep programming events current for all to see.

**Strategy #6: Social Media**

Social media as a broad category of external communications is becoming an increasingly important force in developing strategies to reach out to that audience. There are a variety of definitions of social media but basically they encompass all forms of electronic communications on various platforms that allow people to share content, profiles, opinions, insights, experiences, and even share media.

In fact, social media has evolved into a new marketing tool that allows organizations to get to know their customers and prospects in ways that were previously not possible. Some consider social media as the beginning of a marketing revolution.

However you define it, social media is changing the way organizations approach all aspects of communicating with their audiences. Consider these statistics:

- In a study conducted by the Masdar Institute of Science and Technology in Abu Dhabi, it was found that on average, any individual is just 12 hours of separation from another around the world, using social networking sites.

- The Pew Research Center’s *Internet & American Life* Project has been studying online adults’ social networking sites use since 2005, and has seen substantial growth since then. Today, 72% of online adults (18 and older) use social networking sites. Although younger adults continue to be the most likely social media users, one of the more striking stories about the social networking population has been the growth among older internet users in recent years. Those ages 65 and older have roughly tripled their
presence on social networking sites in the last five years—from 13% in the spring of 2009 to 43% in 2013.

- Worldwide, there are over 1.5 billion active Facebook users. (Source: Facebook) This is a 23% increase from March 2012. What this means: Facebook is too big to ignore.

- Social Media is becoming an integral part of fundraising and donations (MDGAdvertising) Click here for a graphic describing how social giving is becoming very popular and effective among nonprofits.

- An important statistic found on the above graphic: **98% of all nonprofits have a Facebook page.**

What does all this mean? ESU should consider using all forms of external communication if it intends to expand its audience and grow its member base. The addition of social media is one of many strategies that may help attract a younger demographic.

Branches should take a close look at social media options to see how they might impact many areas of branch operations—membership, communications, programming (younger members may develop ESU programs that appeal to a broader age range), succession planning (younger members will allow for better succession planning choices) etc.

By using social media, our message and mission will expand and grow in these digital platforms, we will contribute to more communities than we have before, we will get feedback from our audiences and, most of all, we will create a meaningful connection to those who follow us on these social media. This takes us back to an important statement in the Introduction to the “Communication” section in *Straight Talk: A “connected” audience is a hallmark of a successful organization.* These demographic changes will not happen overnight. But the forces for change must start sometime. Why not now?

**Try Facebook**

The first step is to try the social medium that is used by most (98%) nonprofits—Facebook. It’s very easy to set up a Facebook page. Facebook has two primary formats: a personal page and a business/organization page. So, be sure to use the correct format for your ESU Facebook page. If there is no branch member who can set up your Facebook page, just ask one of the members’ children who has Facebook experience and they will probably be happy to set it up. Once set up, assign someone to add postings frequently and keep it “lively.” An inactive or dormant Facebook page is useless.

Also, Facebook recently produced a 13-page report titled, “Building Your Presence with Facebook Pages: A Guide for Causes and Nonprofits—Best Practices for Facebook Pages.” Click Here to download the PDF. In the Appendix is a Word document of an email sent by the Kansas City Branch to its members announcing the launch of its Facebook page. It gives some guidelines on how Facebook could be helpful to branch operations and could be a sample when you are launching your Facebook page.

**Strategy #7: Utilize the ESU Annual Report**

The 2013 fiscal year’s Annual Report was mailed to all members at the end of the fiscal year. It is a comprehensive overview of the organization and its programs. This professionally produced and printed report can serve many purposes. First, it is a good marketing tool for promoting the ESU to the many individuals and organizations who contributed to the ESU during the year as well as a tool for attracting others in the New Year. Secondly, this report is designed to serve as a stimulus to attract new members and aid in fundraising and grant applications while keeping members aware of the ESU’s wider picture and what their membership supports. Printed copies of this Annual Report are available in limited quantities for branch use. It is also available in
electronic form for wide distribution. Visit the Branch Resources page of the ESU website to download a copy of the Annual Report.

**Strategy #8: Branch Brochures**

Headquarters offers all branches printed paper brochures, primarily for use in attracting new members. These are full-color, tri-fold brochures that describe the ESU’s national programs as well as local branch activities. This brochure includes an Enrollment Form (short form) that makes it easy for someone to fill out on the spot at a branch event. A template for this brochure is available from the Branch Services Administrator at Headquarters, and when the branch writes the portions relative to branch activities, HQ staff will complete the layout and print them in quantities of 100 per edition at no cost to the branch. All branches should take advantage of this excellent marketing resource. The Appendix has samples of several branch tri-fold brochures.

**Strategy #9: PowerPoint Presentations**

National Headquarters has produced and maintains a PowerPoint presentation that branches may use to introduce the ESU and its current programs. These PowerPoint presentations are customized for each branch’s needs. Contact the Branch Services Administrator at ESU Headquarters to obtain your own custom copy of this PowerPoint presentation.

**Strategy #10: Business Cards**

Business cards are an effective means of getting the ESU brand into the hands of key community leaders. The cards should include the ESU “snake” logo (the ESU compass logo is obsolete) and all standard contact information including the branch website, and the email address that is linked to your website, viz., yourcity@esuus.org. Using this email address provides continuity to the website and the ESU brand. Avoid using personal email addresses on business cards or other ESU stationery. Once you have your ESU Facebook page, include its ESU name on the business card and stationery also. If your budget will allow, business cards should be printed for officers and directors of the branch and used as often as possible.

Business cards can be used in other creative ways that help promote a branch. The Central Florida Branch uses a business card, printed on both sides, to tell the receiver of the card the basic “Who, What, Where and Why” questions of the ESU. A QR code has even been added to the back side so someone with a smartphone and a QR code reader can immediately go to the branch’s website. How cool is that? This business card marketing tool is in the Appendix. If you have a QR reader on your smartphone, go to the Appendix and give it a try!
8. Publicity

- Introduction
- Plan a Clear Strategy
- Set Timetables
- Select Media
- Strategy #1: Fully Utilize the ESU Branch Website
- Strategy #2: Media Relations/Engaging Media Partners
- Strategy #3: How to Write a Press Release that Gets Noticed
- Strategy #4: Online Press Release Services

**Introduction**

“Next to doing the right thing, the most important thing is to let people know you are doing the right thing.” – John D. Rockefeller, Sr.

Publicity is simply finding a way to attract attention to a person, company, product or service. It can also serve as a means for managing the public’s perception of the subject. Simply stated, one of ESU’s publicity goals is to ‘let people know we are doing the right thing,’ Publicity can be considered a subset of Public Relations which is a broader field that includes areas such as investor relations, special events, sponsorships and other activities designed to mold opinion.

For purposes of Straight Talk, we will focus on the publicity aspects of attracting attention to the ESU in general and to our educational outreach programs in particular.

**Plan a Clear Strategy.**

Successful publicity campaigns begin with a clear strategic plan:

1. Who are you trying to reach?
2. Exactly what do you want them to know?
3. What do you want them to do?
4. What publicity tools will you use for this type of program?
5. How much money do you have to spend on the campaign? Set a budget.
6. What is the essential information for the program that needs to be conveyed?
7. What are your human resources? (e.g. branch members that can help, artistic talent, articulate speakers, membership size) Don’t try something ambitious that then fails to deliver because you didn’t have the staff to pull it all together.
8. What location will give your materials the most attention?
9. Is this the right time to be doing this kind of publicity and do we have enough time to plan it? You should start planning several weeks, at least, before any specific event.
10. How will we know if it has worked? It’s always good to have some success criteria: if only five people turn up you will need to do better next time. Set measurable goals.

**Set Timetables**

The size and scope of the publicity campaign will help determine when you need to start the campaign. Usually 3-4 weeks in advance is enough time for most campaigns. If it is a large fundraiser with several sponsors, the coordination may require more advance planning. For very large programs such as the Shakespeare Competition, certain aspects may need to be discussed and set in place 3-4 months in advance such as the venue, the list of judges, the co-sponsors’ responsibilities etc.
Select Media

This may be as simple as sending an email announcement to members for a catered brunch at a member’s home. Or it might be as elaborate as arranging for press, radio, TV, on-air personalities, city officials, multiple press releases etc.

The strategies below are just a few of the tools branches would typically use for publicizing most events. But, depending on the program and size of anticipated attendance, there may be many other publicity tools required.

Strategy #1: Fully Utilize the ESU Branch Website

As discussed in the Communications section above, your branch website will be the go-to source for media, co-sponsors, guest speakers, members, dignitaries attending, etc. Be sure the website has all of the details of the future program clearly spelled out. The program or event should be posted on the branch website at least a week or two before the planning committee even sets the publicity strategy for the event.

The website posting can be as simple as listing the who, what, when and where (if these items are known that far in advance). If not, the branch can post what is known about the program with the notice added, “Further details will be coming soon.” When you are announcing events on the website, be sure that the assigned branch officers are checking the branch email at least daily so that any queries that come through the site are answered promptly.

Strategy #2: Media Relations/Engaging Media Partners

At its core, publicity is the simple act of making a suggestion to a journalist that leads to the inclusion of a company or product in a story. Newspapers, magazines, TV programs and radio shows have large amounts of space to fill and depend upon publicists to help provide story ideas, interview subjects, background information and other material.

Branches that are successful with generating large amounts of press and media coverage claim that their success comes from personally befriending reporters, contributing to specific publications and sections – like the social editor – and personally inviting them to every event the branch holds. Others claim to have had such success with this strategy that they get media people on their boards. The North Carolina Sandhills Branch has a good relationship with a local radio station and every Monday prior to a program, a Sandhills member is interviewed by a local radio personality.

Making one-on-one friendships with media people will greatly increase the chances of having your stories placed. And once one media outlet runs a story, others frequently become interested as well. Just as important as having a membership chair or committee is having a publicity chairman with the social skills to make the personal friendships that allow for recurrent coverage.

Strategy #3: How to Write a Press Release that Gets Noticed

Think of a Press release as your ticket to publicity—one that can get your branch coverage in all kinds of publications or on TV and radio stations. It can open doors in unexpected ways.

Why are you Sending a Press Release?--First, be sure you have a good reason for sending a press release. Obviously, the Shakespeare Competition, a distinguished speaker, announcing the launch of the BUSS program are all good reasons. Even announcing the election of a new board member could call for a simple press release targeted in the proper section in the newspaper, community paper or even a social magazine. These simple press releases succeed in getting the ESU name and brand out in the public which is certainly a goal of successful publicity.
Target Media to the Event. Make sure your press release is appropriately targeted for the publication or broadcast you're sending it to. The editor of Road & Track is not going to be interested in your Queen’s Birthday Afternoon Tea. This example is obvious, but there can be subtle media choices that may require thought for the program at hand. The proper mix of media will help make the publicity campaign successful. Don’t get caught in the trap of sending press releases at random without considering the publication’s audience.

Follow Standard Format. To ensure readability, your press release should follow the standard format: typed, double-spaced, on white letterhead with a contact person's name, title, company, address and phone number in the upper right-hand corner. Below that information, put a brief, eye-catching headline in bold type. A dateline, for example, "Los Angeles, California, April 10, 2014" follows, leading into the first sentence of the release.

Limit your press release to one or two pages at most. It should be just long enough to cover the six basic elements: who, what, when, where, why and how. The answers to these six questions should be mentioned in order of their importance to the story to save the editor time and space.

Don't embellish or hype the information. Remember, you are not writing the article, you are merely presenting the information and showing why it is relevant to that publication in hopes that they will write about it.

Watch Grammar and Avoid Gimmicks. Pay close attention to grammar and spelling. Competition for publicity is intense, and a press release full of typos and errors is more likely to get tossed aside. Some business owners use attention-getting gimmicks to get their press releases noticed. In most cases, this is a waste of money. If your release is well-written and relevant, you don't need singing telegrams or a bouquet of flowers to get your message across.

Be Cautious with Follow-up Call to Reporter. Once you reach the reporter on the telephone, remember that he or she is extremely busy and probably on a deadline. Be courteous, and ask if he or she has time to talk. If not, offer to call back at a more convenient time. If the reporter can talk to you, keep your initial pitch to 20 seconds; afterward, offer to send written information to support your story ideas.

Send Press Releases by Email not U.S. Mail. Today, most media outlets rely on electronic press releases over printed releases. Electronic versions are beneficial to the press as they tend to “copy and paste” what you have presented without edits that may omit the message you wish to share, and most media outlets rely on digital photos, which you can easily attach to the releases.

Promptly Distribute Sample Press Releases after the Competition. Headquarters provides samples of a press release to each branch prior to your local Shakespeare Competition. Be sure and fill in the blanks appropriate to your competition and get these out to your media list well in advance of the event. You should follow up a day or so later with a phone call to your local reporters inviting them to the competition and pointing out that it is a terrific photo opportunity. Once they’ve had your press release in hand and have access to your overall information on your website, they will likely take on the story without your having to explain the ESU story every time you contact them.

Immediately after the National Shakespeare Competition Finals have ended, Headquarters sends each branch personalized releases with photos of each of the branch contestants, and it is essential that branches perform the task of relaying them by email immediately to your list of reporters. This story is the most likely to garner
coverage, and once your local press become aware of you through that story, they are likely to accept additional stories.

Don’t forget to send releases to your local radio stations as well and note on their releases that the event will be ideal for recording or for interesting interviews.

Always include in your release a definition of the ESU and its mission, and close with the best contact information for those interested in membership. Here is the current standard language on the ESU that you should include:

“The English-Speaking Union of the United States is a non-profit, non-political educational organization whose mission is to celebrate English as a shared language to foster global understanding and good will by providing educational and cultural opportunities for students, educators and members. The ESU carries out its work through a network of some 70 branches, sponsoring a variety of language and international education programs.”

Have on hand the standard statements about the ESU’s history and vision points that are available on the ESU National website under Branch Resources. The Branch Services Administrator at Headquarters can help you immediately define the ESU to any press members whose interest you spark.

Compiling a comprehensive list of media contacts can be time consuming and often require frequent updating with changes in personnel occurring frequently in media outlets. One good resource for a media list is your local Convention and Visitor’s Bureau. They often will have extensive media lists that they are willing to share. In the Appendix is a sample of a media list.

If branches have additional tips for publicizing programs and events or if they have had successful publicity campaigns that they want to share, please submit them so they can be added to the Appendix of Straight Talk.

**Strategy #4: Online Press Release Services**

There are various free and fee-based press release services available to use for your press release that gives a wide distribution of media, both local and national. One that has been successfully used by a few branches is PRLOG ([www.prlog.org](http://www.prlog.org)). It is a free press release distribution service. It will distribute your release to various news outlets, has social media integration and other features. If you go to their website, it describes all these features and the set-up is easy to register your ESU Branches. After you are registered it’s very easy to add press releases. If your branch’s budget allows you to expand prlog.org’s services, they offer many more fee-based features that could be helpful. The fee-based services are relatively inexpensive ($49 per release) and the coverage is increased and more detailed statistics on usage, web hits etc. are provided.

[Click Here](http://www.prlog.org) to see a current chart listing the Best Top 10 fee-based press distribution services. You’ll see that some of their clients are major retailers and their fees can be substantial so check them out carefully. A Google search will uncover other services at varying prices.

Don’t forget to check local web-based press release postings and calendar postings which are usually free such as [www.eventful.com](http://www.eventful.com).
A Final Word

This inventory is designed to be a resource document for branch leaders and members. To make it continuously useful, branches need to add to it their successful experiences. It needs to be refreshed periodically.

Increasingly, communications are delivered and content offered through electronic media. Every successful branch needs to use the resources available on the ESU website.

With the posting of numerous manuals to assist branches in organization, good financial practices, fundraising and governance, the regions and the branches will be able to develop the kinds of structure that can support and enhance branches as they grow and become fully active in implementing educational programs to fulfill the ESU mission.

Resources are increasing in number and quality. They are easily available on the web. And the branch websites can become major vehicles for cooperation and growth.
9. Appendix and Sample Documents

**Membership**
- Strategy #1: Focus on Two New Categories of Members
  - Sample email sent to Junior Charter Group.
  - Sample letter sent to educators
- Strategy #2: New Member Candidates from Referrals
  - Sample recruitment letter for new members.
- Strategy #4: Promote ESU Events Using Press Releases and “Friends of ESU”
  - Sample email sign-up log
- Strategy #5: “Gift of Membership” Holiday New Member Promotion
  - Sample email sent to members explaining the promotion
  - Gift Certificate template customized for this promotion
  - Gift of Membership Enrollment Form
  - Sample letter sent to new member recipient
- Strategy #6: Fourth Quarter Bonus for New Members
  - Sample email to members explaining Fourth Quarter Bonus

**Programming**
- Strategy #2: Develop Local Educational Programs
  - Westminster College, contact information

**Fundraising**
- Gift Opportunities
- Donor Intent Agreement
- Grant Proposal Resources
- Case Statement - Indianapolis Branch
- Strategic Planning Document - Indianapolis Branch

**Governance & Succession Planning**
- Investment Policy Statement
- Endowed Gift Agreement
- Duties of regional chairs

**Communication**
- Strategy #3: Newsletters
  - Sample Branch Newsletters
- Strategy #6: Social Media
  - Sample email to members announcing launch of Branch Facebook Page
- Strategy #8: Branch Brochures
  - Sample Branch Brochures
- Strategy #10: Business Cards
  - Sample of Business Card used for branch marketing

**Publicity**
- Strategy #4: Online Press Release Services
  - Media List
Dear Craig, Jennifer, Katie, Kevin, and Toby,

Deborah McArdle, our board member and Treasurer, copied me on a recent email she sent to you. I wanted to follow-up and expand on her correspondence. We believe it’s important as our ESU Kansas City Branch continues to grow, that we expand our membership to a broader age demographic, specifically, ages 35 and under. We feel this group would give us some valuable insight into expanding our programming to appeal to members of all ages and perhaps offer fresh ideas for broadening our member base. To that end, one of our ESU Kansas City Branch’s goals is to establish a select group of “ESU Junior Members,” ages 35 and under. We would be honored if you would consider being charter members in this special group. In addition to enjoying the many activities in our local Branch, you would be part of a worldwide non-profit organization that supports a wide range of educational programs, scholarships, cultural and social activities for its members.

The roots of the English-Speaking Union date to 1918 when it was founded by Sir Evelyn Wrench in London, England. He firmly believed that given the opportunity to know one another personally, people who shared a common language would soon discover that they also shared similar values, whatever their differences in nationality or background. It was that fundamental philosophy that eventually lead to a worldwide organization. The Mission Statement of the ESU is to celebrate English as a shared language which fosters global understanding and good will by providing educational and cultural opportunities for students, educators and members.

I’m attaching some material that will give you some background on the Kansas City Branch of the ESU: 1) a brief history of our Branch, 2) a 2-page brochure highlighting some of our major educational and scholarship programs and, 3) a flyer that briefly describes four of our Kansas City Branch’s programs over the next few months. Finally, in anticipation that you’ll be willing to be our charter members in our new “ESU Junior Member Group,” I’m attaching an ESU Membership Form. In fact, we
just recently added a new “Junior Single” membership category (ages 35 and under) which has a special reduced annual membership rate of $40 and a “Junior Couple” special rate of $65. (Your spouses are certainly welcome to be part of our “Junior Member Group”!) We have tried to make this new “Junior” membership category attractive for new members and affordable as well. Note: as a 501(c)(3) non-profit organization, ESU membership dues and other contributions are tax deductible.

Our upcoming Annual Shakespeare Competition, now in its 29th year, is our Branch’s biggest program of the year. We hope you would be able to attend the Competition and watch the students compete. There will be 16 students competing this year. It will be held on Sunday, February 17, at 6:00 pm at the Plaza Library, 4801 Main St. At the conclusion of the Competition, our ESU KC Branch treats the three distinguished judges of the Competition to an informal reception to thank them for volunteering their time and expertise in judging the students and selecting the first, second and third place winners.

And now for the fun part! We would like to invite you to this reception as our guests so you could meet some of our ESU members and, of course, the three judges. There will be a nice array of food at the reception and a cash bar will be available. This reception will be held at the Grand Street Café following the conclusion of the Competition at approximately 8:15 pm.

In summary, you five “Juniors” should be proud because you were hand-selected by our ESU board members, Deborah McArdle and Berit Lindboe to be the charter members of our “ESU Junior Member Group” and our entire board would be delighted if you joined our membership. If you’re passionate about promoting the English language in all its forms and if you’re passionate about supporting educational programs that benefit all ages and if you would enjoy being part of a non-profit organization that has unique and fun programs and activities, then the ESU is for you!

If you have any questions about the ESU or this new charter group, please don’t hesitate to contact Deborah or me. We look forward to seeing you at the Shakespeare Competition on February 17, and at the Judges’ Reception at Grand Street Café. More details about the Reception will be coming soon. Please RSVP to Deborah about the Judges’ Reception on February 17. Deborah’s contacts are: email: dhmc2@att.net home: (913) 492-8753 cell: (913) 206-4471

With Best Wishes,

Jeff Schnabel
President
English-Speaking Union
Kansas City Branch
(816) 442-7007
www.esuus.org/kansascity

P.S. Please take a look at our website to see some of our past, present and future programs and activities we offer in the Kansas City Branch.
Mr/Ms. ______________
Spring Hill High School
Theatre/English II
19701 S. Ridgeview Road
Spring Hill, KS 66083

Dear Mr/Ms. ______________,

The Board of Directors of the Kansas City Branch of the ESU would like to offer our sincere thanks for the hard work and dedication you put forth for the 2013 ESU Shakespeare Competition last Sunday which, by any measure, was a huge success! Organizing, directing, motivating and encouraging your students in your school’s competition are difficult and challenging tasks. We deeply appreciate all your efforts to select a first place winner in your school.

The English-Speaking Union is fundamentally grounded in education-based goals and programming. Teachers are the core component for achieving those objectives. Our board is always exploring various ways of broadening our membership base and we realize the value an educator brings to our organization. To that end, we added new “Educator” membership categories—“Educator Single” and “Educator Couple” for full-time high school/college teachers and spouses with a reduced annual membership fee.

I know you worked closely with Dan Bukovac, our Vice President of the Shakespeare Competition, in getting your students prepared for your school’s competition and meeting the requirements for entering your first place winner in our branch finals last Sunday. Dan and I would be honored and delighted if you would consider becoming a member of our Kansas City Branch.

With your involvement in the Shakespeare Competition, I’m sure you already have an understanding of the ESU’s mission and the scope and variety of activities and programs we offer to our members throughout the year. Our membership consists of a wide range of talented folks including some retired high school teachers so I’m certain you would feel right at home from the start!

I’m enclosing an ESU Kansas City Branch informational brochure which outlines some of the National and Kansas City Branch programs we offer to members. Again, we hope you’ll consider our invitation to become a member of the ESU Kansas City Branch. Please visit our website which provides details on our past, present and future branch events--www.esuus.org/kansascity. If you have any questions, don’t hesitate to call or email.

Cordially,

Jeff Schnabel
President
English-Speaking Union
Kansas City Branch
jschnabel@kc.rr.com
(816) 442-7007

cc: Dan Bukovac
Dr. and Mrs. __________________
1234 Any Street Ave.
Overland Park, KS 66209

Dear Dr. and Mrs. _____________,

Deborah McArdle, our board member and Treasurer, asked me to send you a little background on the English-Speaking Union. She and all of our members are quite passionate about the mission and goals of the ESU. Once you have learned more about our 95-year-old organization and about our Kansas City branch in particular, we hope you will begin to feel that same passion and might consider joining as members. In addition to enjoying the many activities in our local branch, you would be part of a worldwide non-profit organization that supports a wide range of educational programs, scholarships, cultural events and social activities for its members.

The roots of the English-Speaking Union date to 1918 when it was founded by Sir Evelyn Wrench in London, England. He firmly believed that given the opportunity to know one another personally, people who shared a common language would soon discover that they also shared similar values, whatever their differences in nationality or background. That fundamental philosophy eventually lead to a worldwide organization. There are now 70 ESU branches in the U.S., 36 branches in the U.K. and branches in more than 50 countries on all 5 continents. The Mission Statement of the ESU is to celebrate English as a shared language which fosters global understanding and good will by providing educational and cultural opportunities for students, educators and members.

I’m enclosing some material that will give you a brief background on the Kansas City Branch of the ESU: 1) a history of our branch, 2) a brochure highlighting some of our major educational and scholarship programs and, 3) a flyer that briefly describes some of our Kansas City Branch’s programs over the next few months. I should also mention that, as a 501(c)(3) non-profit organization, ESU membership dues and other contributions are tax deductible.

You’ll note on the enclosed flyer, we just concluded our 29th Annual Shakespeare Competition which is our branch’s biggest program of the year. We had 14 students competing from high schools all over the Kansas city metro area. It was a huge success and our first place winner, Wyatt McCall, a junior from Olathe Northwest High School, recited a captivating monologue of the character Richard III from Shakespeare’s play Richard III. Wyatt will be joining 59 other first-place winners from other ESU branches throughout the U.S. for the National Shakespeare Competition Finals held in New York City on stage at Lincoln Center on April 22. We are very excited for Wyatt and wish him the best of luck.

John and Peg, if you’re passionate about promoting the English language in all its forms and if you’re passionate about supporting educational programs that benefit all ages and if you would enjoy being part of a non-profit organization that has unique and fun programs and activities, then the ESU is for you! We would be delighted if you joined our membership. Also, please take a look at our website to see some of our past, present and future programs and activities we offer in the Kansas City Branch: www.esuus.org/kansascity If you have any questions about the ESU, please don’t hesitate to contact Deborah or me.

Best Wishes,

Jeff Schnabel
President
English-Speaking Union
Kansas City Branch
(816) 442-7007
jschnabel@kc.rr.com

cc: Deborah McArdle
**ENGLISH-SPEAKING UNION**

**(_YOUR CITY_) BRANCH**

I'm interested in learning more about the English-Speaking Union

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Dear ESU Kansas City Branch Members—

If you’re looking for a unique gift for that special person who…

- Loves reading or listening to Shakespeare’s works, or
- Enjoys stimulating educational lectures by locally and internationally prominent guest speakers on a wide variety of topics, or
- Likes to attend plays, concerts and other performing arts programs, or
- Enjoys social gatherings such as celebrating H.M. Queen Elizabeth II’s birthday as part of a formal British Afternoon Tea, or
- Enjoys participating in volunteer experiences that make a difference in the lives of students and teachers, or
- Appreciates the importance of promoting the English language...

Then, what could be a better gift than a special introductory *Gift of Membership* in our own ESU Kansas City Branch?

This would be a GREAT GIFT for---

- A friend of yours who has been thinking of joining the ESU, or
- A relative, young or older, who you know would enjoy the benefits of an ESU membership, or
- A student in high school or college whose course-work would be compatible with our ESU activities and goals as an organization such as a major in Theatre Arts, English, Debate, History, Humanities, Linguistics etc.
- Who else do you think would enjoy an ESU membership?
The ESU Kansas City Branch is offering a special *Holiday ESU Gift of Membership* with the membership period valid now through June 30, 2013 (the end of our fiscal year) at these introductory rates:

- $25 for Single Membership
- $40 for Couple Membership

This will allow the gift recipient to participate in all remaining ESU activities through the end of the fiscal year--and we have many great events planned--such as our Annual Holiday Brunch in early January, our Shakespeare Competition in February, a special group event with the Kansas City Ballet in March, the Evelyn Wrench Lecture Series featuring Lady Julia Boyd as guest speaker in April, and our Queen's Birthday and Afternoon Tea Celebration...other surprises are always possible too!

**How It Works:**

1. Fill out the attached Holiday *Gift of Membership* Enrollment Form for the individual(s) receiving the gift membership.
2. Mail the Enrollment Form(s) with your check (payable to “ESU”) to Jeff Schnabel, 4581 Madison Ave., K.C., Mo. 64111. **Deadline for receiving Form(s): Dec. 15, 2012**
3. You, the gift-giver, will receive a special gift certificate showing the recipient’s name and expiration date of membership (June 30, 2013) along with a welcome letter from the president that you can give to the recipient.
4. We will arrange to get your gift certificate to you as soon as possible after receiving your membership form and check considering the short time frame before Christmas.
5. This special Holiday ESU *Gift of Membership* is only valid for the ESU Kansas City Branch and is not transferable to any other branch.
6. You, the gift-giver, will receive a letter stating that your gift is a 501(c)(3) contribution and is tax deductible to the extent permitted by law.
7. While this introductory *Gift of Membership* expires June 30, 2013, we would welcome the gift recipient to remain a member of our branch and, at that time, invite him or her to renew their membership at the beginning of the new fiscal year (July 1, 2013) at the regular membership rates for which they would qualify.

So, please take a moment to think about those you know who would enjoy this *Gift of Membership* in the ESU Kansas City Branch and let me know if you have any questions.

This is not only a unique gift idea but also a way to expand and grow our membership base.

Hoping to hear from you...

Best Wishes for the Holidays,

Jeff Schnabel
Happy Holidays from The English-Speaking Union!

Gift of Membership Certificate

This certificate entitles Recipient to An Introductory Membership – English-Speaking Union, Kansas City Branch

English-Speaking Union
Kansas City Branch
www.esuus.org/kansascity
Membership valid in Kansas City Branch only
Not transferable to other ESU branches
Certificate has no cash redemption value

Authorized by: Jeffrey L. Schnabel, president
Signature
Expires: June 30, 2013

Not transferable to other ESU branches
Certificate has no cash redemption value

Happy Holidays from The English-Speaking Union!

Gift of Membership Certificate

This certificate entitles Recipient to An Introductory Membership – English-Speaking Union, Kansas City Branch

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Certificate has no cash redemption value
The ESU Kansas City Branch is offering a special Holiday ESU Gift of Membership valid now through June 30, 2013 (the end of our fiscal year) at these introductory rates:

Please choose a category

☐ Single: $25       ☐ Couple: $40

Your Name: ____________________________________________________________

Your Email: ________________________________

Your Phone Number: ________________________________

Your Address: _________________________________________________________

Recipient’s Name: _____________________________________________________

Recipient’s Email: _____________________________________________________

Recipient’s Phone Number: _____________________________________________

Recipient’s Address: ____________________________________________________

Please return this form with a check payable to The English-Speaking Union to:

The English-Speaking Union
Education. Scholarship. Understanding.

Give the Gift of Membership
To the
English-Speaking Union

English-Speaking Union
Kansas City Branch
Attn: Jeffrey Schnabel, President
4581 Madison Avenue
Kansas City, MO 64111

THE ENGLISH-SPEAKING UNION OF THE UNITED STATES
KANSAS CITY BRANCH
email: kansascity@esuus.org  website: www.esuus.org/kansascity
Mrs (name of recipient)
1234 Main St.
Kansas City, MO 64112

Dear __________

Welcome to the English-Speaking Union. We are delighted to present you a special Holiday Introductory Certificate of Membership to the ESU as a gift to you from our ESU member (name of ESU member). Your membership is valid through June 30, 2013, which is the end of our fiscal year. (First name of member) may have told you about our organization. We’re not-for-profit and our mission is to celebrate English as a shared language to foster global understanding and good will by providing educational and cultural opportunities for students, educators and members.

Our Kansas City Branch offers a wide variety of educational, cultural and social activities for our members which I’m certain you will find interesting. I’m enclosing a brochure about the Kansas City Branch and another flyer which lists a few of our recent events as well as others coming in the near future.

I would like to mention our next event—our ESU Annual Holiday Brunch which will be at the Grand St. Café on Sunday, January 13 at 12 noon. Our members gather for an informal brunch, reflect on a great year of ESU activities and feast on award-winning food and even celebrate with traditional British Christmas Crackers. It’s a fun afternoon. I’ll send you a separate email giving all the details on this brunch and hope you can join us!

Again, we are so pleased to have you as a new ESU member and I look forward to meeting you soon! Please visit our Branch website for the latest updates on activities and events and you can also read about some of our past events, too. Our website is www.esuus.org/kansascity.

Best wishes for the holidays,

Jeffrey L. Schnabel
President
English-Speaking Union
Kansas City Branch

December 20 2012
April 1, 2013

Dear ESU Kansas City Members,

As you know, the ESU membership year begins July 1 and ends June 30 (this is also our fiscal year for financial reporting purposes). In June, I’ll be sending out membership renewal notices for our next membership year that begins July 1, 2013.

Even though this fiscal year is nearly over, it is still a good time to bring in new members. If a new member enrolls during the fourth quarter of the fiscal year, that is, during April, May or June, the ESU will allow that new member’s membership to carry over into the new fiscal year. That means the new member gets one, two or three extra months in their first-year membership depending on what month in the fourth quarter they enrolled. Obviously, this only applies to new members.

I wanted to mention this to everyone since we are now in the fourth quarter of our 2012-2013 membership year and I’m sure many of you may know of someone who is right on the edge of deciding to join and maybe these little extra “bonus” months would encourage them to join now rather than wait until the new fiscal year begins. For example, if a new member joined on May 1, 2013, their first-year membership would actually be 14 months long—from May 1, 2013 through June 30, 2014. Of course, they could still join on July 1, 2013, or in any other month for that matter and we always encourage new members to join anytime. Again, these extra months of membership might encourage them to not wait to join until the new fiscal year begins.

So, if you know someone who has been thinking of joining, please mention this to them. Many of our new members are referrals from current members so we encourage you to talk to your friends and invite them to join.

If you need any ESU membership brochures to give to your friends who may be interested in joining, just let me know and I’ll get them to you ASAP. Or, if I can assist with the recruiting of your friends, I’m happy to help. Initially, since these potential members are friends of yours, I would encourage you to approach them first to explain the benefit of enrolling in the next three months.

In the most basic terms, when a new member joins the ESU, or whenver a current member renews their membership, they could think of membership dues as a tax-deductible donation to a worthy organization. But ESU membership means so much more than that. It means being part of an organization that has a mission to promote the English language by providing educational and cultural opportunities for students, educators and members—a goal that should appeal to members of all ages.

If you have any questions, please let me know.

All the best,

Jeff
Contact for scheduling Fulbright-Robertson Visiting Professor of British History:

Dr. Rob Havers  
Executive Director  
National Churchill Museum  
Winston Churchill Memorial & Library  
501 Westminster Avenue  
Fulton, MO 65251  
(573) 592-5233  
Robin.havers@westminster-mo.edu

Note: Fulbright Visiting Professor Program on hiatus until 2014 school term. Contact Dr. Havers around August/September, 2014 for status of program.
Indianapolis Branch
The English Speaking Union

Gift Opportunities

<table>
<thead>
<tr>
<th>Naming Opportunities</th>
<th>Minimum Funding Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ESU Fellow Support</strong></td>
<td></td>
</tr>
<tr>
<td>Endow an ESU Fellow</td>
<td>$500,000/$100,000</td>
</tr>
<tr>
<td>At Indiana University</td>
<td></td>
</tr>
<tr>
<td>Annual ESU Fellow</td>
<td>$25,000/$5,000</td>
</tr>
<tr>
<td>(Renewable each year)</td>
<td></td>
</tr>
<tr>
<td>At Indiana University</td>
<td></td>
</tr>
<tr>
<td><strong>Professional Development for Secondary School</strong></td>
<td></td>
</tr>
<tr>
<td>Endow Professional Development for a Teacher</td>
<td>$100,000</td>
</tr>
<tr>
<td>British University Summer School Program</td>
<td></td>
</tr>
<tr>
<td>Annual Professional Development Award</td>
<td>$5,000</td>
</tr>
<tr>
<td>(Renewable each year)</td>
<td></td>
</tr>
<tr>
<td>British University Summer School Program</td>
<td></td>
</tr>
<tr>
<td><strong>Shakespeare Initiatives</strong></td>
<td></td>
</tr>
<tr>
<td>Endow the Shakespeare Competition</td>
<td>$100,000</td>
</tr>
<tr>
<td>Endow a Shakespeare Workshop for Teachers</td>
<td>$30,000</td>
</tr>
<tr>
<td>Endow a Shakespeare Workshop for Students</td>
<td>$30,000</td>
</tr>
<tr>
<td>Sponsor the Shakespeare Competition</td>
<td>$5,000</td>
</tr>
<tr>
<td>Sponsor a Shakespeare Workshop for Teachers</td>
<td>$1,500</td>
</tr>
<tr>
<td>Sponsor a Shakespeare Workshop for Students</td>
<td>$1,500</td>
</tr>
</tbody>
</table>
WHEREAS, the Indianapolis Branch of The English-Speaking Union of the United States ("ESU") receives, invests, administers, and manages private gifts to fulfill the mission of the Indianapolis Branch of ESU and

WHEREAS, the Donor(s), [Donor names], [Tribute to Donor(s) or other information specific to donor]; and

WHEREAS, the Donor(s) wishes (wish) to (honor _____________,) and has included in her/his/their Will/Trust a bequest/gift to the Indianapolis Branch of the ESU.

WHEREAS, since the Donor’s(s)’ gift does not require the opening of a new account and will therefore not be documented in a gift agreement, the Indianapolis Branch of The English-Speaking Union of the United States desires this agreement to properly document the Donor’s(s)’ intent;

NOW, THEREFORE, IT IS AGREED:

It is the intent of the Donor(s), and the Indianapolis Branch of the ESU agrees, that this gift be used for [Purpose] [Benefiting].

Signed and dated this _______ day of ______________________, 200__.

DONOR

______________________________________________

INDIANAPOLIS BRANCH OF THE ENGLISH SPEAKING-UNION OF THE UNITED STATES

By: ____________________________________________
PLEDGE AGREEMENT
(NAME)

(ADDRESS)

Member ID: XXX

In support of work of The English-Speaking Union of XXXX, I pledge and promise to pay the total sum of $XXX for ______________ (purpose) for the fiscal year XXXX to XXXXX to be paid as follows:

$______.00 on or before /2013
$______.00 on or before /201__
$______.00 on or before /201__

☐ Enclosed is my check of $______.00 payable to The English-Speaking Union of XXX as first payment.

______________________________  _______________________
Donor signature                        Print donor name

______________________________
Date

The English-Speaking Union of XXX hereby accepts and gratefully acknowledges the foregoing pledge and accepts its terms as of the date written.

The English-Speaking Union of XXXXX

By: ______________________________

Titl_________________________ Date:_________________________
Grant Proposal Resources

Many small family foundations do not have websites, but information can be obtained from their 990 filings.

**Guidestar** [http://www.guidestar.org/](http://www.guidestar.org/) is a great free resource for information about foundations including actual 990s from which you can find out:

- if the organization accepts requests for funding or gives only to preselected organizations on page 10 Section XV
- a list of board members/trustees
- a list of the organizations funded (usually toward the end of the 990)

**The Foundation Center** operates libraries in Atlanta, Cleveland, New York, San Francisco, and Washington, D.C. All five Center libraries have staff trained to help you. The Foundation Center website is a great source of information/free webinars/listings: [http://foundationcenter.org/getstarted/nonprofits/](http://foundationcenter.org/getstarted/nonprofits/)

Some states have foundation directories which you may be able to access at your local public library: [http://foundationcenter.org/getstarted/topical/sl_dir.html](http://foundationcenter.org/getstarted/topical/sl_dir.html)

**INFORMATION YOU WILL NEED FOR GRANT APPLICATIONS:**

Use the ESU website for descriptions of our programs. Gather the following information to use in funding requests:

1. The year your branch was founded
2. A short history of the ESU, your branch and the mission
3. For education program funding:
   - The names and locations of the schools involved
   - The number of students in the program
   - Demographic information (% by gender, ethnicity, age)
   - Program budget
   - List of other supporters
   - Testimonials from teachers and students

Sample templates for a “letter of inquiry” are available from the ESU Development office.
How to Make a Grant Proposal to a Small Family Foundation
Tips About How to Approach a Small Family Foundation  By Joanne Fritz
http://nonprofit.about.com/od/foundationfundinggrants/a/cultivatingfamilfound.htm

We are often dazzled by the "name-brand" foundations such as the Gates, Rockefeller, and Ford Foundations, whose assets run into the billions. But 90 percent of foundations have endowments of less than $10 million, and these are mostly small family foundations. A recent survey of family foundations served by Foundation Source provides insight into how to approach these small foundations for grants. The resulting recommendations include:

- **Rethink the way your nonprofit finds foundations.** These smaller family foundations are not usually professionally staffed, and they keep a low profile. They tend to fund locally. They don't belong to associations of funders or attend annual conferences. You won't find their RFPs (requests for proposals) on the usual lists from publications or online sources. They give funds to nonprofits with which they are personally acquainted. Many do not even consider unsolicited requests. You will find them by being well connected in your community and alert to who's funding whom in your own area.

- **Reach these foundations through the personal contacts of your organization's own board members.** Provide ways for family funders to get to know your work through low-pressure opportunities and through their own peers. Invite family members of family foundations to be a part of your work as volunteers by inviting them to sit on your board or to serve in an advisory capacity. Use peer-to-peer contacts to find and cultivate members of the family involved in a family foundation. In the survey, 58 percent of the foundation respondents said that it was very important that "someone I know and respect is closely involved or has asked me to support the project."

- **When applying to a small foundation, try sending a short letter of inquiry.** Most small foundations do not want or need a big proposal package. Some 80 percent of the foundations surveyed said that they preferred to receive a "poorly written request that represented the real words of the applicant" to an elegantly crafted proposal written by a professional grant writer. The key is to be direct and honest. Trust the foundation to ask for more details once it is interested in your project.

- **Think partnerships.** Small family foundations prefer to partner. They want the organization to invest its own funds in the proposed project and are happy to see other funders involved. They also appreciate an "exit" strategy to make sure that the nonprofit does not become dependent. They are not adverse, however, to providing general operating funds, something larger foundations are reluctant to do.

- **Check out how the foundation prefers to be contacted and tailor your request to the foundation's interests.** Most of the small foundations surveyed prefer to be contacted by email rather than mail or personal visits. Furthermore, they say that it is of utmost importance that the proposed project fall within the foundation's priorities and guidelines. They expect the nonprofit to have done its homework before making a request. Check out the foundation's website and/or look up the foundation's 990s through a source such as GuideStar. Small family foundations also don't like generic proposals that are sent to several foundations; and they prefer that the proposal address one specific project that fits them well.

- **Be realistic about your project.** Small funders typically are skeptical of hyperbole and overreaching goals by nonprofits. Aim to be clear, concrete, and directly address risks and challenges. Describe your niche...how does your work differ from the work done by similar organizations?

- **Don't expect quick results from funding requests from small family foundations.** These are part-time philanthropists and they don't usually have professional staff or three or four funding cycles. Be patient and work with the family's schedule and needs.
CASE STATEMENT
THE INDIANAPOLIS BRANCH OF THE ENGLISH-SPEAKING UNION

Introduction

Founded in 1920, The English-Speaking Union of the United States is a 501 (c)(3) nonprofit, non-political educational organization committed to its mission: to promote scholarship and the advancement of knowledge through the effective use of English in an expanding global community. All contributions are tax-deductible to the extent of the law.

The National ESU

The ESU operates through a network of 70 Branches across the U.S. and shares its mission with over 50 ESU organizations around the world. Members provide financial and volunteer support to sustain the ESU’s educational programs, and also engage in a variety of projects in their own communities that may include: seminars, lectures, and other social events. Members benefit greatly from the personal relationships and international exposure gained from ESU activities. The national headquarters of the ESU is located at 144 East 39th Street, New York, New York 10016. Web site: www.esuus.org.

Indianapolis Branch of the ESU

The Indianapolis ESU Branch, founded in 1949, has been a part of the city’s educational and cultural landscape for well over half a century. Founding president, Charles J. Lynn (1949-1957), provided the vision and leadership that made the ESU an important part of the cultural community. As a vice president of Eli Lilly & Company, Mr. Lynn was a significant presence in the city’s business and philanthropic communities. Since its founding, the Indianapolis Branch has enjoyed strong and steady support from its board of directors and ten presidents. The board of directors has approximately 15 members with 9 standing committees:

- Scholarship
- Shakespeare Initiatives
- Programs
- Membership
- Page Scholars
- Books as Envoys
- Development & Investment
- Website
- Public Relations
Indianapolis Branch Legacy

Meeting Dates & Events

In addition to the following educational programs, the Indianapolis Branch membership meets approximately once a month from September through June. One of the goals of the ESU is to foster fellowship among its members, both within Branches and among the Branches across the country and around the world. Meetings usually include a speaker and a meal but sometimes the purpose is simply social. Annual meetings include:

- **The Scholarship Programs** - the British Universities Summer School (BUSS) recipient presents a program about his/her U.K. study program during the previous summer and the ESU Fellow at Indiana University will present a program as well.
- **The Indianapolis Branch Shakespeare Competition** – area high school students compete each February in a recitation of a sonnet and monologue on a prominent stage in Indianapolis, with the winner going on to compete in the national ESU Shakespeare competition at Lincoln Center in New York.
- **The Evelyn Wrench Speaker** (founder of the ESU of the U.S.) – features a guest speaker brought from the United Kingdom to tour our region of the country each year.
- **The Walter Hines Page Scholar Program** – a visiting British educator speaks each year to members of the Branch about his or her professional interest.
- **The Wine & Wassail Holiday Reception** - in December new members are welcomed to membership in the Branch as we gather for wine, wassail, British-inspired hors d’oeuvres, and holiday songs from the Dickens Carolers.
- **The Garden Party/Celebration of the Queen's Birthday/Business Meeting** – held annually in June.

Educational Programs

The English-Speaking Union Fellow at Indiana University

In 1951, the Indianapolis Branch initiated its educational program by sponsoring a British student to attend Indiana University, Bloomington. This scholarship program is Indiana University’s oldest international exchange. For U.K. scholarship students, the IU School of Music has been a strong attraction, but the academic interests of these British scholarship students have varied widely.

British Universities Summer School (BUSS) Program

The Branch participates in the national ESU’s British Universities Summer School (BUSS) program. Since 1976, the Indianapolis Branch has sent an Indiana secondary school teacher to a British university for a summer course of study. Teachers presently may study at the University of Oxford, University of Edinburgh, or the Globe Centre outside London. The Branch extended this scholarship to its thirty-fifth high school teacher in the summer of 2011. Recent recipients have been:

2011 – Laura Gellin – Park Tudor School
2009 – Kim Williams-Pulfer – Park Tudor School

9/19/2013
2008 – Pamela Fischer – Lawrence Central High School
2007 – Lindsay Davis – Heritage Christian School
2006 - Linda Robb – North Central High School
2005 – Garvin Scott – Goshen High School
2004 – Devon R. Zingale – Saint Richard's School
2003 – Jerry Zumer – Cardinal Ritter High School
2002 – Bruce Blomberg – North Central High School
2001 – Pamela A. Fischer – Lawrence Central High School
2000 – William J. Broderick – North Central High School
1999 – Judith M. Reynolds – Indiana School for the Blind
1998 – Sandra L. Lawlis – North Central High School
1997 – David R. Head – Heritage Christian School

The Shakespeare Competition
In 1983, the national ESU launched a Shakespeare Competition with almost 150,000 secondary school students participating. Local Branches conduct their own competitions, and winners receive compensation to compete in the national competition in New York City. First-place winners receive a summer course to study Shakespeare in England. The Indianapolis Branch has participated in the Shakespeare Competition since 1988.

The Walter Hines Page Scholarships
Named after our World War I ambassador to Britain and sponsored by the national ESU, these scholarships promote an exchange of ideas by bringing British educators and administrators to U.S. schools for short-term visits. These educators come to study developments in their specialized fields. A complementary program, the Southern Hemisphere Page Scholar Exchanges, was launched in 1998. This program offers U.S. and southern hemisphere educators the opportunity to visit schools while they are still in session.

Books-Across-the-Sea
The final national educational initiative sponsored by the Indianapolis Branch is the Books-Across-the-Sea program, representing various educational projects featuring the English written word and the role of books as interpreters of culture.

- **The Ambassador Book Awards** – are presented annually to authors whose works best represent American life in fiction, biography, poetry, and American Studies.
- **Books as Envoys Program** - these works are sent as “literary ambassadors” of American culture to ESUs around the world for distribution to local libraries and schools. *The Indianapolis Branch is partnered with the Bath Branch in England* in the Books as Envoys program and hopes to further develop this partnership.
Indianapolis Branch  
The English-Speaking Union of the United States  
Strategic Planning Document (Draft)  

The ESU in Indianapolis, 2005-10: Building on Half a Century of Success

Strategic planning for the Indianapolis Branch of the ESU began in the spring of 2005. Goals were established for the five-year period, 2005-2010. The board of directors reviewed and approved the strategic plan document on ____.

Scholarship Committee:

1. Fully fund the one British University Summer School (BUSS) scholarship given annually to a secondary school teacher.
2. Add a second, fully funded BUSS scholarship.
3. Increase the funding for our annual ESU Fellow at Indiana University scholarship from $2,500 to $5,000.

Membership Committee:

1. By 2008, increase the number of membership units from the current 93 to 150.
2. By 2010, increase the number of membership units from 150 to 200.

Shakespeare Initiatives Committee:

1. For the Shakespeare Competition, the goals are to a.) make it more statewide in nature, b.) increase the number of participants so there will be an afternoon preliminary round and then an evening final competition, c.) consider the possibility of an awards dinner, and d.) continue the new partnership with the Indiana Repertory Theatre.
2. Increase the number of participants in the annual Shakespeare Teacher Workshop to 20-25, the maximum.
3. Increase the number of participants in the annual Shakespeare Student Workshop to the maximum number of 40 this year. Once that level is reached, then consider enlarging the scope of the workshop. Continue the collaboration with the IRT and its Educational Wing.
4. For the Shakespeare Gala fund-raiser, continue it as an annual event to support the various Shakespeare initiatives. Monies raised beyond a net profit of $3,000 will go toward supporting the British University Summer School scholarship.

Patrons & Development Committee:

1. Develop a case statement for a Branch fund-raising campaign by July 2005.
2. Print 1,000 case statement brochures by March 15, 2006.
3. Expand the development committee by at least 3 members for future solicitation.
4. Create list of potential donors (individuals and foundations) for cultivation by March 15, 2006.
5. Launch a comprehensive annual fund campaign in the autumn of 2005.
6. Launch a capital campaign to a.) fully fund our current BUSS scholarship (cost: $2,000 annually), b.) add one fully funded BUSS scholarship (cost: $5,000 annually), c.) increase our ESU Fellow at Indiana University scholarship from $2,500 to $5,000 (cost: $2,500 annually), and d.) raise (amount to be determined) to fund our Endowment Fund.

Program Committee:

1. Continue to have a mix of events with regard to cost, speaker/no speaker, etc.
2. Develop the schedule of programs in the summer for the following year, to the extent possible.

Walter Hines Page Scholar/Hospitality Committee:

1. Continue to have a small committee which includes at least one educator.
2. Explore the possibility of having more than one Page Scholar visit each year.
3. Establish a budget for the annual Page Scholar visit.

ESU Book Club:

1. Continue 4 meetings per year, with one meeting devoted to a work from outside the Ambassador Book Awards list.

Books as Envoys:

1. Develop an exchange program with our partner Branch in Munich (Bavarian Branch), whereby members of one Branch would host individuals/families from the other for short visits.

Technology Committee:

1. Build a Branch web site by the winter of 2005.

Public Relations Committee:

1. Send a press release for each program and event.
2. Schedule appearances, as possible, on WFYI 90.1 FM and WICR to publicize the ESU and its programs.

9/19/2013
Indianapolis Branch
Investment Policy Statement

1. Purpose and Background
   A. The purpose of this Investment Policy Statement (the “IPS”) is to assist the Development and Investment Committee (the “Committee”) of the Indianapolis Branch of The English-Speaking Union (the “Branch”) by providing a framework for the design, administration and investment of the Branch’s three (3) funds: Scholarship Fund, Endowment Fund, and Shakespeare Initiatives Fund (collectively the “Funds”).
   B. The Funds were created to assist the Branch in the furtherance of the mission of The English-Speaking Union of the United States which is: “to promote scholarship and the advancement of knowledge through the effective use of English in an expanding global community.”
   C. This IPS is intended to:
      i) Establish formal, yet flexible, investment guidelines including asset allocation targets and total return expectations which reflect business, economic and capital market environments;
      ii) Outline the responsibilities of the Branch, the Committee and any professional advisors retained by the Branch and Committee to assist in achieving the purpose of this IPS.
   D. Subject to approval by the Board of Directors, the Committee will determine a suitable spending plan for each Fund and to address, but not be limited to, each Fund’s spending rate, cash distributions and other capital requirements.

2. Requirements of the Committee
   A. Prepare written investment policies, and document the investment decision-making process.
   B. Diversify assets with regard to specific risk/return objectives including risk tolerance, asset class preferences, time horizon and expected return.
   C. Use prudent experts to make investment decisions.
   D. Retain qualified money managers or mutual funds to implement the approved investment program.
   E. Control investment expenses, and ensure the “best execution” of investment transactions.
   F. Monitor the activities of all money managers and service providers.
   G. Avoid all conflicts of interest.

3. General Information
   A. Principal fiscal contact:
   B. Fiscal year: July 1 – June 30
   C. Funds custodian: SmithBarney
   D. Principal depository institution and account numbers:
      Scholarship Fund
      Shakespeare Initiatives Fund

9/19/2013
Endowment Fund

4. General Investment Objectives
   A. Objectives are the desired interim and end results of the investment program and should be set in conjunction with a comprehensive review and assessment of
      i) Projected financial requirements
      ii) Present investment allocation
      iii) Attitudes, expectations and goals of the Board and Committee
      iv) Investment time horizon and risk tolerance level of the portfolio and the Committee
   B. The committee will consider a number of general investment objectives including, but not limited to, the following:
      i) To take a “reasonable and prudent” amount of risk, as defined by the Committee, and to maximize the return obtained at that risk level.
      ii) To limit risk exposure through prudent diversification.
      iii) To establish policies based on total return rather than current income. This provides the greatest investment flexibility, and therefore the greatest opportunity for growth in assets.
      iv) To control costs of administering and managing the portfolio.
      v) To outperform inflation.

5. Asset Allocation Guidelines
   A. The Branch traditionally has been conservative in all aspects of its management and that conservatism should be reflected in the management of the Funds.
   B. In establishing an appropriate asset allocation for each Fund, the Committee will consider risk tolerance, asset class preferences, time horizon and expected or desired rate of return.
   C. Studies have indicated that over 90 percent of the variability in a portfolio’s investment performance over time can be attributed to how assets are allocated among various security classes and not how asset managers add value through security selection or market timing decisions.
   D. The following broad asset allocation guideline shall apply to each Fund.

<table>
<thead>
<tr>
<th>Asset class</th>
<th>Target</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equities</td>
<td>40%</td>
<td>35%</td>
<td>45%</td>
</tr>
<tr>
<td>Fixed Income</td>
<td>60%</td>
<td>50%</td>
<td>60%</td>
</tr>
</tbody>
</table>

   E. The Committee has selected a diversified approach for each Fund. Various investment management styles and asset classes have been considered. The table below reflects the broad asset mix guidelines for each Fund’s asset allocation.
The target asset allocation for each Fund is intended to be general in nature. Deviations within each asset class are considered normal.

F. It is expected that a separate brokerage/custody account will be maintained for each Fund and that each account will have a money market fund with check writing privileges.

G. Contributions to each Fund may be made by deposit directly to each Fund’s money market account or through the Branch’s general checking account.

H. Disbursements from each Fund will be made by check drawn on each Fund’s money market account at the direction of the President.

I. The Funds are intended to support the long-term mission of the Branch and are not to be used for the day-to-day operations of the Branch.

J. Contributions and Fund monies to be expended within twelve months will be maintained in each Fund’s money market account.

K. The Committee is responsible for monitoring asset class exposures and, if the total market value of the Funds’ asset components (when stated as a percentage of total assets) lies outside the ranges established in this IPS, the Committee may adjust each portfolio to rebalance the total Fund into a position of policy compliance.

6. Securities Guidelines

A. The Committee will select appropriate money managers to manage the Funds’ assets. Managers must meet the following minimum criteria:
   i) Be a bank, insurance company, investment management company or investment advisor as defined by the Registered Investment Advisers Act of 1940.
   ii) Be a firm with no outstanding legal judgments or past judgments that may reflect negatively on the firm.

B. Security guidelines for mutual funds are determined by the constraints outlined within each mutual fund’s specific prospectus. The Committee recognizes that the use of mutual funds limits its ability to outline specific guidelines for each mutual fund. Also, the Committee acknowledges that mutual funds often shift their underlying asset classes and investment styles utilized. Each mutual fund is expected to adhere to its respective prospectus.
7. Standards for Evaluation of Investment Managers
   A. Investment performance will be reviewed at least annually to determine the continued feasibility of achieving the investment objectives and the appropriateness of the IPS for achieving those objectives. It is not expected that the IPS will change frequently. In particular, short-term changes in the financial markets should not require adjustments to the IPS.
   B. Quarterly performance will be evaluated to test progress toward the attainment of longer-term targets. It is understood that there are likely to be short-term periods during which performance deviates from market indices. During such times, greater emphasis shall be placed on peer-performance comparisons with managers employing similar styles.
   C. On a timely basis, the Committee will meet to focus on:
      i) Managers’ adherence to IPS guidelines.
      ii) Material changes in the managers’ organization, investment philosophy, and /or personnel.
      iii) Comparison of the managers’ results to appropriate indices and peer groups.
   D. Appropriate indexes and peer groups:

<table>
<thead>
<tr>
<th>Asset category</th>
<th>Index</th>
<th>Peer group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total U.S. Stock Market</td>
<td>Wilshire 5000</td>
<td>Morningstar Large Blend</td>
</tr>
<tr>
<td>International Stock</td>
<td>MSCI EAFE</td>
<td>Morningstar Foreign Stock</td>
</tr>
<tr>
<td>Total U.S. Bond Market</td>
<td>LB Gov’t/Corp</td>
<td>Morningstar Intermediate Term</td>
</tr>
</tbody>
</table>

8. Contributions, Bequests, and Contributing and Sustaining Memberships
   A. Unless designated by the Donor, funds representing the 50% reimbursed from the National Headquarters and direct gifts less than $150 will be deposited to the general account and remain segregated until distributed at the discretion of the Board among the Scholarship, Endowment and Shakespeare Initiatives Funds, according to need.
   B. Designated gifts will be made directly to the donor’s specified Fund.
   C. The Branch is a tax-exempt organization under the provisions of the Internal Revenue Code, Section 501 (c) (3), so contributions and membership dues are tax deductible.
   D. Contributing and Sustaining membership dues in the Branch will be deposited in the Branch’s general account.
   E. Cash gifts may be made by currency, check, money order or bank draft.
   F. Undesignated gifts of marketable securities will be directed to the Endowment Fund after which they will be liquidated within five (5) business days and the proceeds either invested in the Endowment Fund’s approved managers and /or transferred to other Funds based upon donor and/or Board directives.
   G. Gifts in forms other than cash or marketable securities will first be discussed by the Board, in consultation with the Committee, before considering acceptance by the Branch.
H. Other Use
   i) Donors should allow the Board to redirect the income from permanent endowments to other uses if the original intent no longer is viable.

I. Transferability
   i) If the Branch itself should cease to exist, donors to Branch Funds must be aware that assets including endowments are to be transferred to the national ESU.
   ii) If the national ESU no longer exists as a 501 (c) (3) organization, the Branch in its final act should transfer its permanent endowment corpus and accumulated earnings to a non-profit organization that most closely meets the original purpose of the defunct organization, or to the national, state or local government.

9. Agreement
   The Board of Directors voted to approve on______________________________ the provisions set forth in this Investment Policy Statement for the management of the Branch’s Fund assets, starting on this date and until rescinded or revised in writing.

_________________________________        _________
Branch President        Please print name        Date
Indianapolis Branch
The English-Speaking Union
Of The United States

ENDOWED GIFT AGREEMENT

[ACCOUNT NAME]

DONOR(S): ___________ ("Donor(s)"

AUTHORIZATION: Indianapolis Branch of the English-Speaking Union

WHEREAS, the Indianapolis Branch of the English-Speaking Union receives, invests, administers, and manages private gifts to fulfill the mission of Indianapolis Branch; and

WHEREAS, the Donor(s) wishes [state any donor wishes (e.g. in honor or memory of someone) or information on how the account was created if known] to further the mission of Indianapolis Branch of the English-Speaking Union, and to encourage others to give to the Indianapolis Branch of the English-Speaking Union, and thus has (have) irrevocably given to the Indianapolis Branch funds for the purpose of establishing the _____________ [account name]

NOW, THEREFORE, IT IS AGREED:

1. It is the intent of the Donor(s), and the Indianapolis Branch of the English-Speaking Union agrees, that the income from this gift be used to support

Choose one of the following account descriptions or modify as needed:

Scholarships, fellowships, or awards. The [award, fellowship or scholarship] will be given out to [criteria for selection of recipient can be spelled out here, e.g., "a student enrolled in the School who has an interest in the study of____, etc.")." The number, amount, and recipient(s) of the [award, scholarship or fellowship] will be determined by the Executive Board of Directors of the Indianapolis Branch.

-or-

general purposes. Expenditures may include, but are not limited to, __________program promotion and other expenses which may best serve the [program].
2. The use of this gift will be authorized by the Board of Directors of the Indianapolis Branch of the English-Speaking Union for the reasonable and customary requirements of authorized expenditures, as indicated above, in accordance with internal operating policies governing investments and administration as established by the Board of Directors.

3. The Indianapolis Branch of the English-Speaking Union acknowledges that the Donor(s) intend(s) that the original gift amount will exist in perpetuity with the income being used to support the purpose(s) of the gift. The Board of Directors of the Indianapolis Branch established a spending policy which may be amended from time to time by the Board of Directors. This policy is consistent with the Indianapolis Branch of the English-Speaking Union’s investment philosophy to maintain the purchasing power of the original gift so that the account may keep pace with inflation.

4. The officers and directors of the Indianapolis Branch have the power, and final decision, to invest, to change investments, to accept property, to sell, to hold, or to reinvest all or any of the monies or property transferred to the Indianapolis Branch under the terms of this Agreement in such manner as they deem proper, and any additional gifts received in support of this purpose are subject to the terms of this Agreement.

5. In the event that the original purpose(s) stated here can no longer be fulfilled, the Indianapolis Branch of the English-Speaking Union, through its Board of Directors, shall review the circumstances and shall modify this Agreement to the extent necessary to enable the gift to be used in a manner which coincides with the Donor's (s') original intent as closely as possible, and consistent with the provisions of UMIFA and the internal operating policies of the Indianapolis Branch.

6. The Agreement shall be governed by and interpreted in accordance with the laws of the State of Indiana.

Signed and dated this _______ day of ____________________, 200____.

DONOR

____________________________________________

[Name(s)]

INDIANAPOLIS BRANCH OF THE ENGLISH-SPEAKING UNION

By: ____________________________________________

President

INDIANAPOLIS BRANCH OF THE ENGLISH-SPEAKING UNION

by:

____________________________________________

(Title)

9/19/2013
DUTIES OF REGIONAL CHAIRS

A. Regional Chairmen are full ex officio members of the National Board. As such they participate in the deliberations of the Board, bringing the perspective of Branch experience to the deliberations. As National Board members, they are expected to attend the two National Board Meetings per year, one generally in June in New York City and one at the site of the Annual General Meeting in the fall. In addition to attendance at the board meetings, members are expected to serve on at least one of the board’s committees. They are also expected to contribute financially through the National Patron program and support of the annual national fundraising event.

B. The Regional Chairman should be instrumental in bringing the Branches together and should coordinate, wherever possible, inter-Branch activities and exchange of ideas. S/he should take an active role in the creation of new Branches.

C. The Regional Chairman should be in contact with Branches on a regular basis. The Regional Chairman will inform the Branch Presidents and the National Headquarters of the location and date of the Spring Regional Meeting.

D. The Regional Chairmen should consult with the National Headquarters on the choice of Evelyn Wrench Speakers and, whenever possible, assist with the scheduling of other speakers and programs within the region.

E. The Regional Chairman will preside at Regional meetings. If the Regional Chairman is unable to do so, the Vice Chairman shall substitute.

F. The Regional Chairmen will assist the National Nominating Committee in identifying candidates for the election of National Board members.

G. The Regional Chairman will poll her/his Branches for candidates for the National Merit Award for each Region.

H. Whenever possible, the Regional Chairman should visit the Branches in her/his Region to become acquainted with the strengths and needs of each Branch
Board of Directors

Officers
Chairman,
Dr. Manning Pattillo, Jr.
President,
Mr. Charles Maddrey
Vice President,
Mr. Wesley DeVoto
Recording Secretary,
Mrs. Linda DeFoor Wickham
Corresponding Secretary,
Mrs. Rex Morris, Jr.
Treasurer,
Mr. John O. Selvage
Immediate Past President,
Mr. Pace Huff

Directors
Term ending 2015
Mrs. Gene Sanders (Grace)
Ms. Pam Sellman
Mr. John White

Term ending 2014
Mr. Burt Nicholson
Mrs. John Selvage
Dr. Louise Valine

Term ending 2013
Mrs. Edward Larson
Mr. Martin Wilson
Mr. Kurt Travis

Communications Committee
Chair, Jean Morris
Gail Glatti
Bobby Helton
Gloria Norris
Judy Orthwein

Suggestions are welcome. Email rjmorrisjr@comcast.net with ideas.

Welcome to new Members
Ben and Charlotte Carmichael
Amelia Gordon
Dr. David Kahn and Susan Phillips
Harold and Betty Parker
Bill Pennington
Lyn Coltman (returning member)

PRESIDENT’S CORNER
Dear Fellow Branch Members,

Our Fiscal year is off to a great start. Our programs this fall have been very interesting and well attended. We have added a number of new members to our Branch, and our various committees are hard at work. I call your attention to the upcoming meetings and events listed elsewhere in this newsletter. Your program committee has just met and is finalizing programs for March, April and May.

A number of us participated in the first-ever web conference of the annual meeting of the national organization. Some exciting things are happening with our national organization. You can read more about this in a separate item in the newsletter. Our thanks go to Kim Scholes for updating the Branch website to complement the upgraded national website. It is worth a look at www.esuus.org.

Recently the national office mailed a third and final notice of your annual dues. Please forward your dues as both the national organization and your Branch depend upon your financial support for our operations.

The Branch Nominating Committee will have their first meeting in February, so if you or someone you know would like to serve on the Branch Board, please contact Dr. Manning Pattillo at 404.264.3345.

Kind regards,

Charles Maddrey, President, Atlanta Branch

Great news! We have assistance for our Treasurer!
David Robichaud answered our plea in the past newsletter for some assistance for our Treasurer. He is a CPA and well versed in QuickBooks and similar programs. He assisted our Treasurer with the recent Branch internal audit and with the preparation of the annual IRS Form 990 that we sent to the national headquarters.

+++++++++++++

Pam Sellman is a recent addition to the Board of Directors for the year 2015. Appointed to replace Jaclyn Gannon, who resigned, Pam says she is a novice with a need to learn the workings of the Board, but we think she will be a positive and productive member.
Dr. Carlton Presents “Edward VIII and Mrs. Simpson”

Speaking to a packed house on September 15, in the Gould Room at the Cathedral of St. Philip, Dr. Charles Carlton charmed the English-Speaking Union, Atlanta Branch, members and guests with his talk, “Edward VIII and Mrs. Simpson”. After enjoying a reception catered by Soiree, members listened to Charles Maddrey as he opened the meeting with a welcome to everyone and turned it over to Chair of the event, Holly Berney, who gave a humorous introduction of Dr. Carlton.

Educated in England at Cardiff and in America for a PhD. at UCLA, author and lecturer Dr. Carlton gave a fascinating talk about the ins and outs of the Royal Family’s relationships as a result of the romance and subsequent marriage of Edward VIII and Wallace Simpson. Without giving a sanitized version of the events, he presented details of Edward’s childhood relationships with his parents and early contemporaries. Some of us were in awe hearing the open and frank details of the Duke’s visits with Hitler and members of the Nazi regime and Churchill’s reaction to the unfolding of those events. He spoke of the animosity that existed between members of the family and Wallce’s belief that someday she would become the Queen consort. Gail Glatti thinks everything played out providentially, as Elizabeth was meant to be Queen, setting an honorable example to her people for a long and inspiring reign.

EVELYN WRENCH INTERNATIONAL SPEAKER ROGER PRINGLE SPEAKS TO THE ATLANTA BRANCH

On October 26, the Atlanta Branch members gathered in formal attire at the elegant Capital City Club, Brookhaven, to enjoy a lecture presented by the Evelyn Wrench speaker, Roger Pringle. Beautifully gown ladies and men in tuxedoes socialized in the bar area until called to dinner and to order by President Maddrey. We welcomed guests, Dr. Sheila Cavanaugh and Dr. Kevin Quarmby, Professors of English at Oxford College, Emory, and complementary guest, Sally White, who wrote the wonderful article about ESU in the Northside Neighbor Newspaper. We were delighted to see new members, Dr. David Kahn and Susan Phillips, John and Dr. Linda Harned, and returning member Lyn Colman. Vernon Abrams attended as a guest of Holly Berney.

Kurt Travis, chair of the event, introduced the speaker with a humorous description of being aided by seven-year old daughter Grace in planning for the event and selecting and wrapping the gift. Holly Berney co-chaired with Kurt (and young Grace). John Hammaker hosted Dr. Pringle, and Ed and Gloria Norris showed him the History Center and hosted lunch at the Swan Coach House earlier in the day.

Dr. Pringle charmed us with his presentation “Americans, Shakespeare and Stratford”. Director of the Shakespeare Birthplace Trust, Dr. Pringle quoted from comments made by many American writers who visited Stratford in their lifetimes. Washington Irving was especially loved by the English and had much to say in his writings about Stratford. Two American Presidents, Jefferson and Adams, visited the home of Shakespeare and Anne Hathaway. He also described some of his work with well-known actors. He ended his talk reciting a quote from Macbeth and an exquisite Shakespearean love sonnet. It was a beautiful evening.

“THE WAR OF 1812: A CANADIAN PRESPECTIVE”

On November 13, Grace Sanders, chair, introduced Rob Pengelly, Consul and Manager of Foreign Policy and Diplomacy at the Consulate-General of Canada to speak on the forgotten War of 1812. Her introduction included a welcome to him and introduction of his colleague Judith Costella. Also present were Michael Henderson and his wife. Michael is the President of Button Gwinnett Chapter Georgia Society (SAR), who she met during the unveiling of the Appling Sword in the Capitol in October.

The meeting room in the Cathedral of St. Philip was draped with informative banners listing events/dates surrounding the War of 1812. Last summer Rob Pengelly participated in the dedication of a Garden of Peace in St. Mary’s, Georgia, and with the celebration of 200 years of peace between our countries, which share the longest and most open border in the world (guaranteed by the Treaty of Ghent). His stories included some details of the Battle of New Orleans which made Andrew Jackson a hero, Laura Ingersoll Secord’s 20-mile walk to warn the British of an impending invasion, the return to Georgia of the Appling Sword, made to give to Daniel Appling of Columbia County, Georgia. He reminded us of Francis Scott Key’s writing of the National Anthem at the Battle of Ft. McHenry in 1814. It was during this war that Dolly Madison saved Washington’s portrait during the burning of the White House.

ESU Members enjoyed his talk tremendously, and following it, we all enjoyed delicious desserts prepared by Grace Sanders and Elizabeth Munson during plenty of conversation. It was a grand evening.

December 16. Bells were ringing at the annual Christmas Party. John Hammaker once again invited ESU members and guests to enjoy lovely ambiance, delicious repast, and wonderful Christmas music. Rose Maddrey chaired, but because of a tumble missed the event. We hope she is getting better every day. Jere Dills catered. Chandler Rudd underwrote the music, played by Robert Strickland. Members enjoyed it tremendously. The party was a huge success in spite of an outbreak of colds and flu bugs that arrived along with the rain. Thanks, John, for hosting.

email: atlanta@esuus.org  
website: www.esuus.org/atlanta
The 2012 Annual General Meeting of the English-Speaking Union of the United States

All members were invited to watch and hear the meeting via computer.

The meeting was held Saturday, October 27, 2012, at 12:30 pm to 2:30 pm.

The Hon. Patricia S. Schroeder, Chair of the English-Speaking Union of the United States, presided and called the meeting to order with a welcome to all present, both delegates and observers. She described the meeting as a new adventure in our technological world and thanked Grant Hamel for getting the live broadcast up and going. After a report on the well being of the ESU and a description of the International Meeting in Istanbul, Turkey, in August, she introduced Paul Gordon, who brought greetings from Dartmouth House, London.

Alice Boyne, Executive Director, gave details of all the ESU Programs and the criteria for selection of same. We even were able to view the performance of the latest winner of the Shakespeare Competition. She proudly invited all to share the pleasure of the new features of the website. She assured of the health and well being of the BUSS Program, Shakespeare Set Free (BUSS teachers were heading this up), New Middle School Debating Program, and a new English in Action program for American Immigrants.

Alice Irby reported on the activities of branches in the various regions. That was very informative. Many are doing well.

Hollis Sturges, ESU National Treasurer, gave a detailed financial report.

Dr. Quinn Peeper, chairman of the nominating committee, took the microphone and presented the slate for members of the new board. The Committee, Peeper, Knight, Maschmeier, Pray, and Robison nominated Gurgein of N.Y., Hill of Chicago, Hodgkins of Greensboro, NC, Maschmeier, of Seattle, Peeper of New Orleans, Pitt of Chicago, Vickers of Greenville, NC. Schroeder, Boyne and Sturges remain as Board Members.

We were all invited to view the new website by going to www.esuus.org or call 212-818-1200.

Did you know……

ESU INTERNATIONAL --- launched in London on June 28, 1918 on the initiative of journalist Evelyn Wrench together with sixteen friends, with the aim of promoting closer ties between English speaking peoples from around the world. Former Prime Minister A. J. Balfour addressed the first public meeting of the organization. It is notable that in April 1921, Winston Churchill became Chairman, as the previous Chairman, Lord Reading – departed to become Viceroy of India. Churchill remained Chairman until 1926. As early as 1920 the first scholarship exchange programs were launched in several U. S. branches.

ESU UNITED STATES (ESUUS) was formally organized in 1920, and is headquartered in a charming, three-story, 19th century carriage house located in the historic Murray Hill district of New York City. ESUUS operates through a network of 76 branches across the United States and shares a mission with more than 40 English-Speaking Unions around the world. ESUUS is a non-profit, non-political, educational service organization whose mission is to promote scholarship and the advancement of knowledge through the effective use of English in an expanding global community. (Thanks to ESU friends in Palm Desert, California)

SOON TO GO TO PRINT

The Communications Committee has started the process of updating our Branch Directory 2013 with an eye towards having it available in January. All Branch members who are current with their dues will be included. This is another good reason to pay your annual dues. We also list Patrons in the Directory, so please give some consideration to supporting this program.

The Nominations Committee will soon be considering new candidates to serve as officers and directors in the coming year.

Let your voice be heard if you have anyone in mind including yourself. Call Dr. Manning Pattillo at 404-264-3345.

The Program Committee, Chaired by Charles Maddrey, and aided by members Holly Berney, Caroline Coles, Grace Sanders, and Kurt Travis, is hard at work planning for the best programs available for the remainder of the year.

Save these dates!!

January 27, 2013, Speaker, Dr. Patrick Allitt, “England During Our Civil War” 1:00 PM at the Ansley Park Golf Club.

February 24 The Annual Shakespeare Competition will again be held at the New American Shakespeare Tavern. A delightful experience for all members, this is the cornerstone of the English-Speaking Union. Details TBA.

Happy Holidays

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email: atlanta@esuus.org  website: www.esuus.org/atlanta
Dr. James Cooper will be our guest speaker this fall. He will be arriving at Westminster College in Fulton, MO., from the U.K. in a couple of months at which time we will schedule his visit to Kansas City. This lecture series always has interesting speakers with topics of interest for our members. Save the date of Sunday, December 2, 2012, for a 1:00 pm luncheon lecture. Location to be announced.

**Westminster College Fulbright-Robertson Visiting Professor of British History**

This annual event, sponsored by the Daughters of the British Empire, will be Saturday, November 10, 2012, 10:00 am-4:30 pm at the Lenexa Community Center. Shop for a variety of British goods, foods, cheese, tea, Celtic jewelry, antiques, books and holiday goods. Entertainment provided by local dancers, musicians and more throughout the day. Children’s room. Enjoy an English Afternoon Tea served by the DBE ladies. Our ESU Branch will have an informational booth at the British Faire.

**British Faire**

Our annual ESU Shakespeare Competition will be held on Sunday, February 17, 2013, 2:00 pm, KC Library, Plaza Branch. High School students from the KC metro area compete in reciting Shakespeare monologues and sonnets. This is our Branch's biggest and most important educational event. You will not want to miss this one. In 2012, we had seventeen students competing for first place. Our Kansas City Branch winner, Elizabeth Hix, was a semi-finalist in the National Competition in New York City.

**ESU Annual Shakespeare Competition**

ESU members and guests will be treated to an original ballet work inspired by Shakespeare’s *A Midsummer Night’s Dream*. Created by KC Ballet’s Artistic Director, William Whiteman, the ballet includes the entire ballet company, two actors and a chorus of singers. It includes spoken excerpts from Shakespeare's play, a host of familiar characters and chorus of singers. It includes spoken excerpts from Shakespeare's play, a host of familiar characters and a chorus of singers. The ESU Group will attend a 2:00 PM matinee at the Kauffman Centre on Sunday, March 24, 2013. Watch for more details on this exciting event coming next year.

**ESU Shakespeare Festival Group Night**

**Evelyn Wrench Lecture Series**

Julia Boyd is a distinguished British author and historian who will give the lecture, *A Dance with the Dragon: The Vanished World of Peking*, based on her new book. Drawing on a variety of unpublished diaries and letters, Julia Boyd will tell the story of this small band of foreigners and will explore life in the walled foreign legation quarter. Based on her recent book, *A Dance with the Dragon*, Lady Boyd’s lecture will draw a dazzling portrait of an eclectic foreign community and of China itself, one that is essential in understanding China and its attitude to foreigners today.

A past Wrench speaker who heard her give this lecture recently in London wrote that her lecture was brilliant, that she brought the subject to life vividly and that the “audience was captivated.”

Lady Boyd is a former governor of the English-Speaking Union of the Commonwealth and a former Chairman of the Winston Churchill Memorial Trust Council.

This lecture will be co-sponsored by the Kansas City Central Library, 14 W. 10th St. The lecture is scheduled for Wednesday, April 17, 2013.

**ESU Shakespeare Festival Group Night**

Each year, the ESU attends a Shakespeare Play produced by the Heart of America Shakespeare Festival in Southmoreland Park. This year, we saw Antony and Cleopatra. ESU members get a group discount for the reserved seats near the stage.
ESU ANNUAL SHAKESPEARE COMPETITION

Our annual ESU Shakespeare Competition will be held on Sunday, February 17, 2013, 6:00 pm, KC Library, Plaza Branch. High School students from the KC metro area compete in reciting Shakespeare monologues and sonnets. This is our Branch’s biggest and most important educational event. You will not want to miss this one. In 2012, we had seventeen students competing for first place. Our Kansas City Branch winner, Elizabeth Hix, was a semi-finalist in the National Competition in New York City. ESU members and guests will be treated to an original ballet work inspired by Shakespeare’s A Midsummer Night’s Dream. Created by KC Ballet’s Artistic Director, William Whitener, the ballet includes the entire ballet company, two actors and a chorus of singers. It includes spoken excerpts from Shakespeare’s play, a host of familiar characters and 11 KC Ballet students. Our ESU Group will attend a 2:00 PM matinee at the Kauffman Theatre on Sunday, March 24, 2013. Watch for more details on this exciting event.

Taking Tea with Shakespeare & Friends

The Leawood Stage Company, The Barn Players and the Magna Carta Chapter of the Daughters of the British Empire will host the 10th annual Taking Tea with Shakespeare & Friends on Sunday, April 21, 2013, 2:00-4:00 pm at the Leawood City Hall Community Center. There is nothing so quintessentially British as taking afternoon tea while enjoying scenes from Shakespeare’s plays. A portion of the ESU ticket sales from this special fundraiser will benefit our KC Branch programs. Mark your calendar so you won’t miss this fun event.

Evelyn Wrench Lecture Series

Julia Boyd is a distinguished British author and historian who will give the lecture, A Dance with the Dragon: The Vanished World of Peking, based on her new book. Drawing on a variety of unpublished diaries and letters, she will tell the story of this small band of foreigners and will explore life in the walled foreign legation quarter. Based on her recent book, A Dance with the Dragon, Lady Boyd’s lecture will draw a dazzling portrait of an eclectic foreign community and of China itself, one that is essential in understanding China and its attitude to foreigners today.

A past Wrench speaker who heard her give this lecture recently in London wrote that her lecture was brilliant, that she brought the subject to life vividly and that the “audience was captivated.”

Lady Boyd is a former governor of the English-Speaking Union of the Commonwealth and a former Chairman of the Winston Churchill Memorial Trust Council. She is married to Sir John Boyd, a lifelong diplomat who has served as British Ambassador to Japan, Chairman of the British Museum, Chairman of the Royal Shakespeare Company and Master of Churchill College, Cambridge University.

This is a free lecture and is co-sponsored by the Kansas City Branch of the ESU and the Kansas City Central Library, 14 W. 10th St. Wednesday, April 17, 2013. Time and RSVP details coming soon.
Dr. Felicia Londré’s Annual Lecture on Shakespeare

Here’s an opportunity to attend a lecture on the topic of the Shakespeare authorship question. Dr. Felicia Londré will be presenting her annual lecture and slide presentation which surveys the evidence relating to the authorship of the plays and sonnets of the author known as William Shakespeare. Dr. Felicia Londré is the Curators’ Professor of Theatre at UMKC and Honorary Co-Founder of the Heart of America Shakespeare Festival. Her annual lecture at UMKC on the Shakespeare authorship question will be presented Monday, November 4, 2013, between 3:30 to 4:45 pm in Royall Hall, Room 104 on the UMKC Campus. It is a free lecture and everyone who has an interest in Shakespeare is encouraged to attend.

British Faire

All ESU members and guests are invited to the 28th Annual British Faire in Lenexa, KS. It is sponsored by the Daughters of the British Empire in Kansas. This annual fundraising event benefits retirement communities and local charities. Some of the entertainment includes local dancers, musicians and more throughout the day and an English Afternoon Tea served by the DBE ladies. Our ESU Branch will have an informational booth at the Faire so be sure to stop by and have your photo taken to be added to our Facebook page. Join us on Saturday, November 16, 2013, 10:00 am to 4:30 pm. Admission is $4.00. Afternoon Tea is $14 including admission. Lenexa Community Center, Lenexa, KS.

ESU Group Evening Concert

The Heart of America Shakespeare Festival and The Bach Aria Soloists are combining the evocative music of the great classic composers Bach, Vivaldi, Dowland and Handel with the poetry of the greatest playwright William Shakespeare. Sat. Nov. 23, 7:30 at Central Library, downtown. Free admission.

Evelyn Wrench Lecture Series

Martin Bell, OBE, Distinguished British Journalist & Author to Speak in Kansas City

Martin Bell, OBE, one of the best-known and most highly regarded names in British television journalism, will present a compelling lecture in Kansas City describing his life, his war experiences, the experience of being a British politician and his books.

Just as Walter Cronkite was “the most trusted man in American,” so Martin Bell represents journalistic integrity and straight-talking to several generations of Britons.

He has been many things – an icon of BBC war reporting, Britain’s first independent MP for 50 years, a UNICEF ambassador, a staunch supporter of rights for the armed forces, and a tireless campaigner for honesty and accountability in politics. His most recent book, For Whom the Bell Tolls, reveals he’s also a talented poet of light verse. In his lecture, Martin Bell will discuss his life, his war experiences, the experience of being a politician, and his poetry.

The English-Speaking Union of Kansas City is hosting this free lecture on Wednesday, November 6, 2013, 6:00 pm at the Plaza Branch of the KC Public Library, Truman Forum Auditorium. Mr. Bell will autograph his new book after the lecture.

ESU Annual Shakespeare Competition Branch Finals

Our annual ESU Shakespeare Competition will be held on Sunday, February 16, 2014, 4:30 pm, Coterie Theatre, Crown Center. High School students from the KC metro area compete in reciting Shakespeare monologues and sonnets. This is our Branch’s biggest and most important educational event. You will not want to miss this.
FEBRUARY MEETINGS

Scholars’ Reception

Please join us for our reception where our 2013 E-SU scholars will be introduced and presented with their scholarship checks for summer study in the United Kingdom.

- Linda Wheeler, Vice President Scholarships

Annual Shakespeare Competition

Annually the Central Florida E-SU sponsors a Shakespeare Competition for Orange, Seminole, and Osceola county students in grades 9-12. Each student, who is the winner at his or her own school memorizes and presents a Shakespearean sonnet and also a twenty-line passage from one of the plays. The Central Florida winner is then given an all-expense paid trip to New York to compete in the National E-SU Shakespeare Competition. The first-place winner in New York is given a scholarship to study at the British American Drama Academy the following summer. Please come to cheer them on and support the youth of our community.

- Ginger Bryant, Vice President Shakespeare Competition
SCHOLARSHIP’S VICE PRESIDENT’S MESSAGE

I was able to learn about other cultures through my daily interactions with the other students in the summer school.”

“The experience brought the Globe and William Shakespeare down to earth for me, to a place where he’s not so scary to teach anymore.”

“The twenty days I spent at the University of Oxford were some of the most memorable and rewarding days of my life thus far.”

“Our experience exploring and engaging in textual study through movement and voice was eye-opening.”

These words came from the four teachers chosen as E-SU Central Florida scholars for the 2012 British University Summer School Program (BUSS). The scholarship program began in 1962, funded by a legacy from member Wilbur Dorsett. In that year the first scholarship for $500 was given to Rollins College professor Charles Mahan. Each summer from 1962 through 2001 Dorsett scholars traveled to England or Scotland to participate in the BUSS program. Starting in 1997 the Drey Endowment, a generous bequest by members Eugene and Jessie Drey, expanded the program until 2013, when five scholarships will be awarded.

In the past our branch was also able, under the Southern Hemisphere program, to send middle-school teachers to New Zealand to study the educational system there. Over the years other scholars have received funds for independent study, another dimension of our scholarship program.

How does a teacher become a BUSS scholar? The process starts with applications from teachers in Orange, Seminole, and Osceola Counties. In addition to supplying basic information, a curriculum vitae, official college transcripts, and a letter of recommendation from a school administrator, the teachers must have completed four full years of teaching and intend to remain in the classroom three years here in Central Florida. Perhaps the most important pieces of the applications are the essays: one-page, single-spaced descriptions of how their chosen programs will enhance their knowledge of content and teaching skills. They must then describe how they will translate what they learned to their classroom instruction.

On the application the teachers indicate their chosen field of study. In 2013 the choices are “Teaching Shakespeare Through Performance” at Shakespeare’s Globe Theatre London; “English Literature” or “History, Politics, and Society” at University of Oxford’s Exeter College; and “Text and Context: British and Irish Literature from 1900 to the Present” at The University of Edinburgh in Scotland. After reading and discussing the applications, the Education Committee selects the teachers who will be invited to an interview session held in late January. The committee then names up to five teachers as the BUSS scholars, with each receiving a $6,000 grant that will cover airfare, tuition, residence, board, and some incidental expenses.

The future scholars are honored at an award reception in February hosted by our Branch. Following their summer abroad, they present a planned program based on their experiences, scheduled in October 2013.

Over the fifty years of our Central Florida Branch scholarship program, one belief has been shared by all scholars: My experience was life-changing.

Linda Wheeler, VP Scholarship
A WARM WELCOME TO OUR NEWEST MEMBERS:

- Christian and Lorre Davis
- Thelma L. Emerson
- Donna French
- Sandra L. Monroe
- Fran Morrissey
- Patrick and Sandra Powers

WELCOME BACK TO THIS FORMER MEMBER:

- Harl G. Graham

SAVE THE DATES!

There are two meetings that members may want to attend this year. More details about each will follow soon.

- The E-SU 2013 Annual Conference in Seattle, Washington - September 26-29
- The Spring Regional Meeting for Region V will be held in a location to be advised in Florida on April 19-20

DREY GRANT SUPPORTS ELEMENTARY SCHOOL LITERACY PROJECT

The Horse Tales Project, a national program that started with Walter Farley’s children’s classic The Black Stallion, will reach more than fifteen hundred Orange County elementary students this year. Since its beginning as The Black Stallion Project, the program has expanded its activities to include other popular horse stories such as Black Beauty. In addition to basic reading sessions, field trips to a horse farm give students the experience of interacting with horses in the real world. Reading, writing, and art activities, in response to that experience, link their learning to educational benchmarks. For a number of years The Horse Tales Project has been serving Central Florida students and many others across the country with proven success.

Donna Miller
VP, Drey Endowment

Milagros Bosch-Taylor is an English teacher at Cypress Creek High School in Orange County. She attended Shakespeare Through Performance at Shakespeare’s Globe in London. About her experience Milagros wrote, “Although the entire trip was amazing, the Globe did lose some of its magic for me, but in a good way. The experience brought the Globe and William Shakespeare down to earth for me, to a place where he’s not so scary to teach anymore.”
PHOTOGRAPHER ON THE LOOSE

What were you doing when our official photographer, Julian Renfro, was snapping away at the January program at Maison & Jardin?

You might find out by going to our website at www.esuus.org/centralflorida, click on PROGRAM GALLERY, then click on program dates of December 3 - Lady Mayoress and January 21 - Gilbert and Sullivan, then click on numbers above note showing the number of items.

THE ENGLISH-SPEAKING UNION
CENTRAL FLORIDA BRANCH
Membership Application

I wish to become a member of the English-Speaking Union, Central Florida Branch. A check for my dues is enclosed.

Please send a check for $45 (single membership) or $60 (couple membership) to the English-Speaking Union, PO Box 758, Winter Park, FL 32790-0758.

Name and Spouse’s Name

___________________________________________________________________________________

Address__________________________________ City____________________State ____ Zip ______

Phone, Fax, and Email ________________________________

Visit the E-SU Central Florida website at www.esuus.org/centralflorida for more information.

E-SU PROGRAMS 2012-2013
MARK YOUR CALENDARS!

☺ March 11 - Mtg. at the University Club
☺ April 8 - Mtg. at the University Club
☺ May 13 - Mtg. at the University Club
Dear ESU Members:

I'm pleased to announce that our Kansas City Branch is one of the first in the U.S. to have its very own Facebook page! I should point out that the ESU National Office has had its own Facebook page for several years and I think it's important to have a Facebook page at the Branch-level as well. Did you know that 98% of all non-profit organizations have a Facebook page?

We now have a Facebook page! It's still in early development and I will be building onto it all the time, so check back frequently to see additions not only from me but from others who add posts, photos and comments.

Here is where you can find it: www.facebook.com/esukansacity

So, what do you do now?

>>>If you have your own personal Facebook account, then just go to our ESU Facebook link above and you can look around. You must have a personal Facebook account to log on or you can't go to a Facebook page, that's Facebook's rules.

>>>Be sure to "Like" us--just click on the "Like" button to the right of our Facebook name. You can also "Like" other posts on the page. We love "Likes!!" All these "likes" give us an ever-expanding circle of Facebook friends who will follow our branch activities.

>>>You can "comment" on all the posts and you can "reply" to others' comments.

What else can you do on our new ESU Kansas City Facebook page?

1. It serves as an interactive newsletter--not only can you check out what activities are coming to ESU, you can look at postings of past events and comment on them. The ability to comment and reply to other people's comments is part of what makes Facebook not only a fun social medium for the visitor, it also gives great feedback so we can see comments from members or the general public and have a better indication of how popular some of our activities are compared to others. Facebook is a social network (emphasis on the social) and communication is at the core of social networks.

2. Facebook is more immediate than a website because we can update it locally and respond to comments almost immediately. Since Facebook has a mobile app feature for smartphones, it gives us a portable Facebook page that members and guests can use more easily than being stuck on a desktop or laptop.

3. Facebook is very user-friendly…it's easy for members and guests to make posts, comments and replies. You can even share posts with your friends. For example, if you see a post for an upcoming event such as the Queen's Birthday Tea that you think a friend of yours would like to know about or even attend, you can easily "share" that event with your Facebook friends.

4. "Likes" are not just for fun, they give us an indication of how many people are visiting our Facebook page so we like more "likes!!"

5. You can add photos or videos you took at previous ESU events and you can add links to appropriate websites that might be of interest to other members.
6. Facebook appeals to a wide demographic and we think its appeal, particularly to younger adults, will create interest in ESU that could not be accomplished in any other way.

7. The possibilities are almost limitless…for example, what about Fundraising? There are almost a dozen online Fundraising organizations that use Facebook as their preferred social medium for fundraising activities specifically geared toward non-profits.

8. If you are already on Facebook, you probably have many Facebook friends who would love to know about the ESU. You can click on the "Invite" button next to each of your "Friends" and they will see a link to our ESU Facebook page on their Facebook page. Also, at the top of our ESU Facebook page, look for a small "about" at the bottom of the box. Click on "about" and you can read all about the ESU and the Kansas City Branch.

9. Scroll down to the very bottom of the page where it says "Founded in 1920." I actually found a photo of Lt. Col. Marvin H. Gates who was the first president of the Kansas City Branch when it was founded in 1920! How cool is that? When you click on his photo, you can read what Division in the Army he served in WW I.

So, you can see that Facebook is not just a fun way to waste away the afternoon, it's a very useful marketing and communicating tool. Let me know if you have any questions about our Facebook page….and have FUN with it!!

Cheers!
Jeff
THE SEATTLE BRANCH WELCOMES YOU!

Our Board and Chairs continue to work hard to bring interesting events for your enjoyment. In May, we joined Regional Chair Jeremy Woan for the Region VIII meeting in California to exchange ideas and develop friendships. This was a brilliant event.

We will have the same venue next March for our Shakespeare Competition, and we encourage our members to come out and watch the students give their monologue and sonnet. Our 2013 winner from Roosevelt High, Ben Briggs and his teacher David Grosskopf, went on to compete at Lincoln Center in NYC. Ben joined us at our AGM in May to share his experiences of his trip to New York, and to express his thanks to the ESU for their support. We will work to alert educators to the teacher scholarships available at Huntington, California this summer, and other educational opportunities.

With a fresh slate of officers selected from long term board members, we will be putting a lot of effort into our Summer Garden Party and ESU National Meeting which will be held here in September. Our theme is “Language takes Flight” and wonderful events have been put together by the event Chair Sandra Boyd. We hope to see you all there.

Our Summer Garden Party and Christmas Ball top up our other fund raising efforts. The Seattle branch generously awards 3-4 scholarships to graduate students at the University of Washington Department of English.

Our popular English-In-Action, speaker events and travel opportunities will continue, along with our cocktail receptions held in private homes. It looks like a great year!

Sarah L. Atwood, President

The benefits of being an ESU SEATTLE BRANCH Member

- Participating in volunteer experiences where you can make a difference...... from “one-on-one” tutoring in English conversation to fund-raising for scholarships
- Participating in Shakespeare contest held annually and in outreach to teachers in the Puget Sound area
- A chance to provide at-home hospitality for scholars and speakers from abroad
- A monthly Branch Newsletter
- Opportunities to travel and attend Regional, National and International Conferences
- Membership privileges at ESU National Headquarters in New York City, including library facilities
- Membership privileges at the ESU of the Commonwealth Headquarters in London and discounted rates at select hotels in London and Edinburgh

The English-Speaking Union of the United States
144 East 39th Street
New York, NY 10016
Phone: 212 - 818 - 1200
Fax: 212 - 867 - 4177
info@esuus.org

JOIN US in our international FELLOWSHIP to promote SCHOLARSHIP and the advancement of KNOWLEDGE through the effective use of English in an expanding global COMMUNITY
Join the English-Speaking Union of the United States

The ESU celebrates English as a shared language to foster global understanding and good will by providing educational and cultural opportunities for students, educators, and members.

The English-Speaking Union National Shakespeare Competition is the ESU’s largest educational initiative. In conjunction with schools and local communities, it provides teachers with a program for the study of Shakespeare and language arts. Through the competition, students are encouraged to develop their communication skills and an appreciation of the power of language and literature. Initiated in 1983, the National Shakespeare Competition has engaged more than 250,000 young people in 60 communities nationwide.

The ESU Middle School Debate Program is an educational initiative to help young adolescents develop critical thinking and language arts skills through public speaking. We are partnering with Claremont McKenna College’s Middle School Public Debate Program, international leaders in middle school debate education, to establish debate programs in ESU Branch communities around the country.

The National Speakers Program provides expert lecturers on history, politics, the arts, language, literature and current events to cities across the US through the network of ESU Branches. The ESUUS has always provided a platform for gifted speakers from a broad spectrum of fields, including journalism, government, business, and the arts.

The Shakespeare Set Free Institutes partner the English-Speaking Union with the world-renowned Folger Shakespeare Library, a leader in Shakespeare education. These two-day, low-cost, non-residential institutes for High School teachers use the Folger’s smart, easily adapted methods and materials to teach performance-based approaches to Shakespeare.

British University Summer School fellowships allow American high school teachers to become students again while studying English literature, theatre or social studies at Oxford University, the Globe Centre in London and Edinburgh University. BUSS teachers bring back to their classrooms a broader educational perspective. More than 60 fellowships are awarded annually.

English in Action, an English as a second language tutoring program, has served the international community in this country for more than 50 years. Through EiA, newcomers to the US are matched with American volunteers for one-to-one conversation, helping them master conversational English and fostering cross-cultural exchange. Since its inception, tens of thousands of individuals have participated as volunteers or students.

YES I would like to join the English-Speaking Union

☐ Single: ______________________ $ 60.00
☐ Couple: _____________________ $ 90.00

You can also join online at www.esuus.org/seattle

Name: _______________________________________________________
Spouse’s Name: ________________________________________________
Address: ______________________________________________________
Tel: ____________________________________________________________
E-Mail: _________________________________________________________

☐ Check: Payable to the “English-Speaking Union”
☐ Credit Card: Total:__________________________
     __________ Visa ______ MC ______ Amex ______ Discover
Card #: ________________________________________________________
Name on Card: _________________________________________________
Expiration Date (mm/yy): _______________________________________
Billing Address: _________________________________________________

Signature: _____________________________________________________
Sponsored by:___________________________________________________

We encourage you to include your e-mail address. All personal information is confidential and will NOT be shared with any outside parties.

Please return this form with payment to
The English-Speaking Union
Seattle Branch
PO Box 19673
Seattle, WA 98109

The English-Speaking Union is a 501(c)(3) organization. Contributions are tax deductible to the extent permitted by law.
YES I would like to join the
ENGLISH-SPEAKING UNION

☐ Single __________________ $ 100.00
☐ Couple __________________ $ 125.00
☐ Branch Patron _____________ $ 500.00
☐ Branch Sustainer __________ $ 1000.00

☐ I would like to make an additional contribution to
the work of the ESU in the amount of $ ________

Total Enclosed $ ________

Name: ______________________________________
Spouse’s Name: _______________________________
Address: _____________________________________
____________________________________________
City: ________________________________________
State / Zip: ___________________________________
Telephone: _________________________________
E-Mail: ______________________________________

☐ Check: Payable to the “English-Speaking Union”
☐ Credit Card: Total: ________________________
____ Visa ______ MC ______ Amex ______ Discover
Card #: ______________________________________
Expiration Date (mm/yy): ______________________
Name on Card: ______________________________
Billing Address: __________________________________
____________________________________________
City: ________________________________________
State / Zip: ___________________________________

The English-Speaking Union
Education. Scholarship. Understanding.

The benefits of being an ESU
CHICAGO BRANCH Member

Members benefit from the personal relationships and
international connections gained from ESU activities.
Your membership will help support a wide range of edu-
cational programs and scholarships. You will be “creating
global understanding through English.” In short, belong-
ing to the ESU helps others as well as yourself.

AUGUST 15 and 16, 2013
Shakespeare Set Free Seminar
Co-Hosted with The Folger Shakespeare Library
Roosevelt University

SEPTEMBER 25, 2013
“Chicago”, A Photographic Portrait
with Tom Barrett and Courtney Pitt
Sunda Restaurant – 5:30pm

NOVEMBER 11, 2013
Shakespeare High School Seminar
Ganz Hall, Roosevelt University

NOVEMBER 22, 2013
Event Co-Sponsored with the Royal Oak Foundation
“Painshill Park and the Georgian Landscape Tradition”
Cherrill Sands, Garden Historian and
Lady Alexander of Weedon, Chair of Painshill Park Trust
The Casino - Luncheon

DECEMBER 13, 2013
Holiday Sing Along, with Stanley Paul
The Casino- Luncheon

DECEMBER 31, 2013
New Year’s Eve Dinner Dance
“Gatsby” Theme
White or Black Tie
Co-Chairs: Courtney G. Pitt and Brian D. White
Woman’s Athletic Club of Chicago

The CHICAGO BRANCH of the
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www.esuus.org/chicago

The English-Speaking Union is a 501(c)(3) organization.
Contributions are tax deductible to the extent permitted by law.

JOIN US in our international
FELLOWSHIP to promote
SCHOLARSHIP and the advancement of
KNOWLEDGE through the effective
use of English in an expanding global
COMMUNITY
Join the English-Speaking Union of the United States

The ESU’s mission drives its innovative programs that support creative teaching methods and provide opportunities for native and non-native English speakers to develop their speaking and comprehension skills. In addition, the ESU assists individuals to function in the wider global community through international scholarships and exchanges, providing students and teachers with opportunities to study in other countries, exchange ideas and broaden their perspectives.

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**Books-Across-the-Sea**, with its Ambassador Book Awards and Books as Envoys components, disseminates books as interpreters of culture. The Ambassador Book Awards are presented annually to authors whose works best represent American life. Through the Books as Envoys program, these works are then sent as “literary ambassadors” of American culture to ESUs around the world for distribution to local libraries and schools.

**The Walter Hines Page Scholarships** bring British and southern hemisphere educators and administrators for short-term visits to schools in nearly 40 ESU Branch communities, in order to study and compare developments in their specialized fields.

Through **The Secondary School Exchange**, American and British teenagers spend a postgraduate semester or year in the opposite country on a full scholarship provided by participating schools. Since 1928, thousands of students have participated, many describing the experience as the most beneficially formative in their lives.

**The Luard Scholarships** are merit awards offered to top students attending United Negro College Fund institutions, enabling them to spend their junior year at a British university of their choosing. Since 1969, 68 Luard scholars have studied at universities, including Oxford, Cambridge and the London School of Economics, where they have performed with distinction as scholars and unofficial American ambassadors.

**The National Speakers Program** provides expert lecturers on history, politics, the arts, language, literature and current events to cities across the US through the network of ESU Branches. The English-Speaking Union of the United States has always provided a platform for gifted speakers from a broad spectrum of fields, including journalism, government, business, teaching and the arts.

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Please join us as one of the 72 United States Branches, along with those in 55 countries, including 36 Branches in the UK. We are a non-profit, non-political, educational organization whose mission is to promote scholarship and the advancement of knowledge through the effective use of English in an expanding global community.

The Chicago Branch supports the aims and mission of the ESU through educational and cultural programs, all of which are made possible through the generous support of our members and friends.

The **Chicago Branch Scholarship Program** awards grants to Illinois graduate students and junior faculty for dissertation and post-graduate research in the UK.

We participate in the national BUSS program, and we host a Page Scholar and the Evelyn Wrench speaker each year. In addition, the Chicago Branch sends copies of the Ambassador Award Books and English dictionaries to ESU organizations, currently in Poland and Bulgaria, under the Books As Envoys program.

Each February, Chicagoland high school students perform a Shakespeare monologue and sonnet before a distinguished panel of judges. The Chicago Branch winner receives an all-expenses-paid trip to New York City to compete in the National Shakespeare Competition at Lincoln Center. The trip also includes exclusive acting workshops, sightseeing activities and spending the weekend with 60 fellow teenage aficionados of the Bard and the chance to win an all-expenses-paid trip to study acting in England.
The ESU
CLEVELAND BRANCH

BENEFITS OF MEMBERSHIP
- Meet new people who share your interests
- Support the enhancement of English
- Attend lectures and dinner parties
- In London, privileges at Dartmouth House and attractive rates at the Dorchester Hotel

SHAKESPEARE COMPETITION
This has been our primary educational program for over 25 years. Students in public, private, and parochial high schools in Cuyahoga and neighboring counties compete for local and national prizes. This year’s grand prize was a summer scholarship at the Royal Academy of Dramatic Art’s Young Actors Summer School (London).

BOOKS-ACROSS-THE-SEA
In collaboration with Third World Books, we help send quantities of English language children’s books to schools in Africa, as well as to Cleveland inner-city schools.

BUSS SCHOLARSHIP
We sent teacher Rebecca Papakonstantinou of Berea High to the International Shakespeare Globe Centre in London during the Summer of 2012.

“What We Are”...
- English is our bond...
- Scholarship is our path...
- Understanding is our goal.

Jerry Grdina, Cleveland President

www.esuus.org/cleveland • (216-236-3401)
Join the English-Speaking Union of the United States

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THE ESU CLEVELAND BRANCH WELCOMES YOU!

“COME FOR THE FUN” ... Casual cocktail parties, musical and dinner-speaker programs, theater parties, cultural events, Summer Garden Party, and gala Holiday Beefeater’s Ball.

“STAY FOR THE MISSION” ... Shakespeare Competition; Page Scholar; Evelyn Wrench Speaker; Books Across the Sea (and City); and ESU Regional, National and World Conferences.

2012/13 PROGRAMS (watch for invitations)
AUG - Rock & Roll & Shakespeare
SEP - Sunday Art Museum Brunch
OCT - Hanna Theater Party
DEC 6 - Beefeaters Ball, Mayfield Country Club
JAN - Casual T.G.I.F. Party, Stone Mad Pub
FEB - Hanna Theater Party
FEB 22 - Shakespeare Finals, Playhouse Square
MAR - Casual T.G.I.F. Party
APR - Page Teacher/Scholar Speaker & Dinner
JUN 22 - Annual Meeting & Brunch

HISTORY OF THE CLEVELAND BRANCH
The Cleveland Branch was founded in 1923 under President John A. Penton of the Penton Publishing Co. The Branch disbanded at the end of WWII, but re-activated in 1960 under the presidency of Dr. Harlan Hamilton, Professor of English at Western Reserve University (now CWRU).

www.esuus.org/cleveland ● (216) 236-3401
The English-Speaking Union
Central Florida Branch

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Email: centralfl@esuus.org
Website: esuus.org/centralflorida

WHAT WE ARE ALL ABOUT

- International speaker programs
- British Summer School teacher scholarships
- Gala dinner meetings
- Professional development programs for teachers
- High school Shakespeare Competitions
- ESOL student awards
- Elementary school literacy programs
- Award-winning media projects in literature
- Middle school literacy programs
- Summer Shakespeare program
- Social gatherings
- and much more