



**The English Speaking Union
Annual Conference 2023**
Blueprint for Growth: Unity of Purpose

Kansas City, Missouri
October 20th - 22nd

**ESU
USA**

**100
YEARS**



Expanding minds
Strengthening friendships
Unlocking opportunities

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AGENDA

Welcome and Thank You

Dr. Quinn Peeper, Chair

Report of the Nominating Committee & Election of New Board Members

Susan Ferris

Report of the Finance & Audit Committee

Noel Sloan

Report of the President / Executive Director

Karen Karpowich, Alice Uhl, Rona Weitz , and Maryellen Liotta

Annual General Meeting 2024



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Welcome and Address from the Chairman

Dr. E. Quinn Peeper



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Report of the Nominating Committee

Susan Ferris, Chair



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New Board Members

Bruce Haefner

Stacy Louizos

Barbara Stark

Beatrice von der Schulenburg

Mary Way

Welcome



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Report of the Finance & Audit Committees

Noel Sloan, Treasurer



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Fiscal 22/23 Actual

Operating deficit was \$186,000
Endowment drawdown was 6.6%

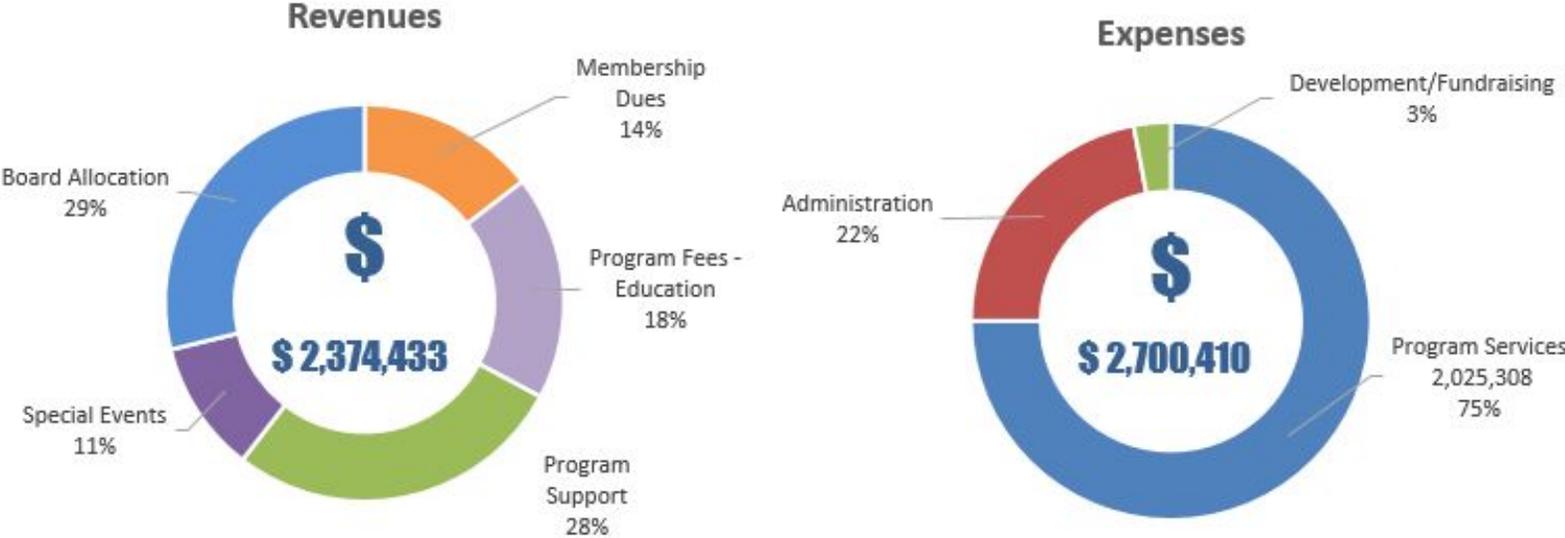
Fiscal 23/24 Budget

Operating deficit of \$326,000
Endowment drawdown of 7.4%



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FY 23/24 Budget



The ESU annual budget has been approved with a projected budget deficit of \$325,977.



FY 23/24 Budget

TRENDS AND OPPORTUNITIES IDENTIFIED

Trends

- The ESU has realized budget deficits over the past several years.
 - This was partly the result of one-time events (pandemic) and short-term economic fluctuations; and
 - An inherent imbalance in spending vs revenue generation.

Opportunities - medium to long-term horizon

- With the aim to eliminate recurring deficits, the ESU is setting in place a 5-year Institutional Advancement Plan that seeks to address:
 - Increasing revenue, reducing spending (e.g., cutting inefficient programs and costs), developing equitable cost sharing policies, and implementing structural changes to boost organizational efficiency while maintaining our capacity to grow.
- A Task Force, consisting of board members, branch members, and national staff, will be established to provide a comprehensive evaluation of the institutional advancement plan, make recommendations for improvement, and provide implementation support. The task force will also monitor results against performance indicators.

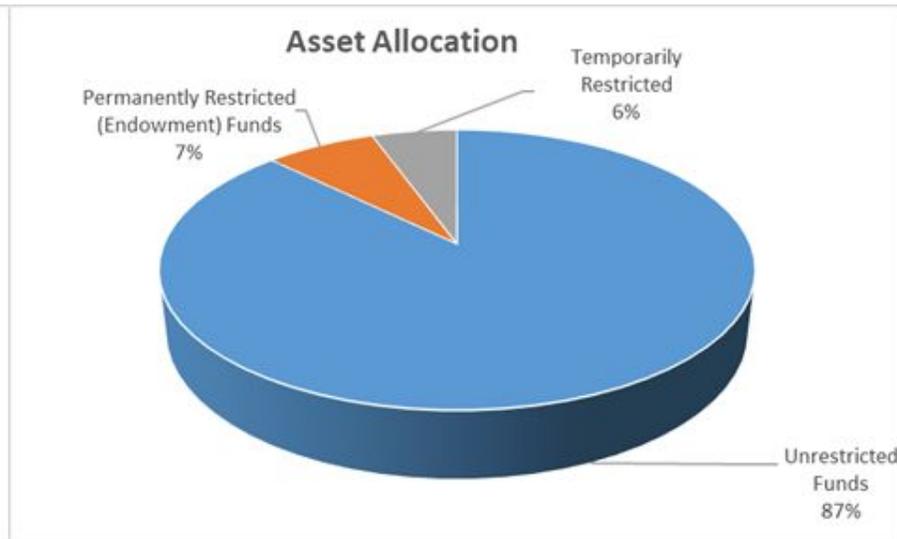
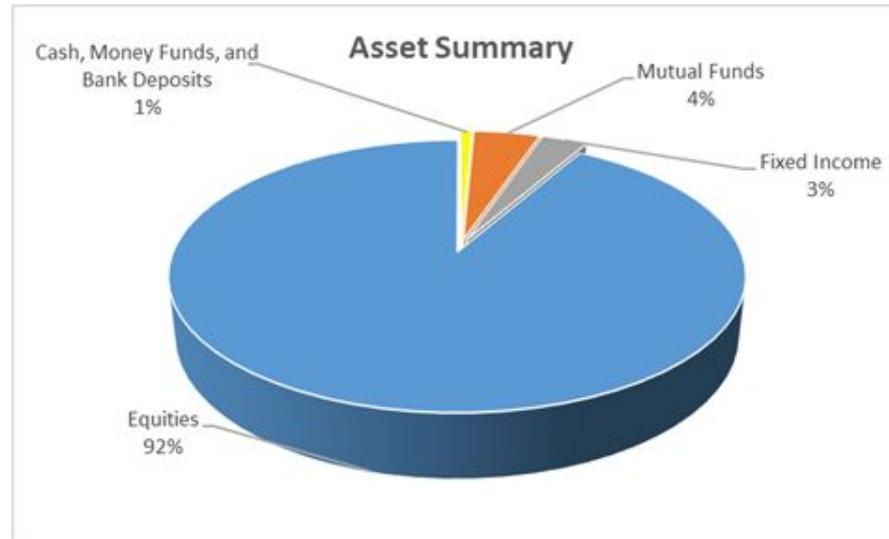


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ESU Investment Portfolio

ASSET SUMMARY		June 30, 2023
Cash, Money Funds, and Bank Deposits		91,017
Mutual Funds		550,910
Fixed Income		383,665
Equities		11,365,849
TOTAL ASSETS *		12,391,441

ASSET ALLOCATION		June 30, 2023
Unrestricted Funds		10,819,347
Permanently Restricted (Endowment) Funds		887,336
Temporarily Restricted		684,758
TOTAL ASSETS *		12,391,441



Investment Portfolio Balance as of 10/18/2023 \$12,393,994

Unrestricted funds	Contributions/funds with no external restrictions as to use or purpose and which can be used for any purpose. This category includes Board Designated funds which are unrestricted funds that are subject to self-imposed restrictions by action of the board.
Temporarily restricted funds	Consists of contributions/funds with donor-imposed restrictions that limit the use of the funds, usually for a particular purpose or time limit.
Permanently restricted funds	Contributions/funds, which are not expendable by the ESU. The most prevalent example of this is an endowment fund. The organization is not able to use the principal but is able to use the investment earnings.



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ESU Balance Sheet

English Speaking Union of the United States

Statements of Financial Position

As of June 30,, 2023 and June 30, 2022

	6/30/2023	6/30/2022	Change
ASSETS			
Cash & Equivalents	\$ 270,611	\$ 602,452	\$ (331,841)
Accounts Receivables and Prepaid Expenses	\$ 118,599	\$ 220,321	\$ (101,723)
Total Current Assets	\$ 389,209	\$ 822,774	\$ (433,564)
Investments at Fair value	\$ 12,391,441	\$ 11,648,180	\$ 743,260
Headquarters Building-Net of Accumulated Depreciation	\$ 3,288,243	\$ 3,460,269	\$ (172,026)
Office Equipment-Net of Accumulated Depreciation	\$ 92,453	\$ 51,509	\$ 40,943
Total Fixed Assets	\$ 3,380,696	\$ 3,511,778	\$ (131,082)
Total Assets	\$ 16,161,346	\$ 15,982,733	\$ 178,614
LIABILITIES & NET ASSETS			
Accounts Payable & Accrued Expenses	\$ 331,167	\$ 560,898	\$ (87,115)
Total Net Assets	15,830,179	15,421,834	265,729
Total Liabilities & Net Assets	\$ 16,161,346	\$ 15,982,733	\$ 178,614



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ESU Audit Update

Auditor Info:

PKF O'Connor Davies, LLP
Managing Partner - Joseph Izzo
New York Office

Audit:

PKF O'Connor Davies, LLP performed an audit of the FY 21/22 Consolidated Financial Statements, and issued an unqualified opinion on the organization-wide Financial Statements – meaning that in the auditor's judgment, the organization's financial statements were fairly and appropriately presented, without any identified exceptions, and in compliance with generally accepted accounting principles (GAAP).

The fiscal year 22/23 audit of the ESU Consolidated Financial Statements is under way and has an estimated completion date of March - April 2024.



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Report of the President / Executive Director

Karen Karpowich



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Where We Are Now

Growth - Of our values and mission

Resilience - Being more nimble in the post Covid environment

Leadership Building - Future growth with new approaches and models

Communications - Balance between in person and digital communications

Financial - Our challenge and do we undervalue who we are what we do

Partnership - Not going it alone

Empowerment - Roles and relationships of National & Branches

Impact - Our greatest asset our constituents



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Task Force and Self Study Group

Chart and define a Growth Plan to advance the Impact of our Mission over next 3 to 5 years

A Task Force, consisting of board members, branch members, and national staff, will be established to provide a comprehensive evaluation of the institutional advancement plan, make recommendations for improvement, and provide implementation support. The task force will also monitor results against performance indicators and work to control costs with the additional aim of eliminating recurring deficits.

The current members include

Board: Barbara Hughes , Noel Sloan. Bruce Thompson, Michelle Seale

Staff: Anthony DiFilippo, Alice Uhl, Rona Weitz Rossana Ivanova

Branch: Randy Brannan, TBD, TBD, TBD



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2023 ESU National Shakespeare Competition

CELEBRATING 40 YEARS!

41 ESU Branch champions traveled to New York City!
to perform at Lincoln Center
Monday April 24, 2023



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2023 ESU National Shakespeare Competition

CELEBRATING 40 YEARS!

Preceded by a Weekend of Events in New York City
for students, teachers & parents!



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& the Winners are . . .



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Growing the Competition in 2024

To date, 40 ESU branches have registered to participate in the 2024 National Shakespeare Competition



We are happy to welcome the following branches back into the competition:

- ❖ Philadelphia
- ❖ Nashville
- ❖ Niagra Frontier/Buffalo
- ❖ Albany
- ❖ St. Louis

As well as the these newly formed branches:

- ❖ Wyoming
- ❖ West Virginia
- ❖ Michigan (Interlochen Arts Academy)

Secondary School Exchange Scholarship (SSE)

The oldest ESU educational program, SSE is a merit-based scholarship that provides tuition, room and board for students to spend a “Gap” Year abroad in the UK or US between high school and college.

Since 1928, the SSE Scholarship has allowed thousands of students to expand their horizons by studying at secondary schools in the US and UK. SSE students gain maturity, independence and global perspectives that benefit them in college and in their future careers. Fourteen students are just begun their studies for the 2023/24 academic year in the US & UK.



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Luard Morse Scholarship

This merit-based scholarship provides a \$25,000 award for students from Historically Black Colleges and Universities (HBCUs) to study for a semester at a British University during their junior year. Since 1969, 88 exceptional students have been awarded scholarships to study at 18 Universities including Oxford, Cambridge, & the London School of Economics.



2023/2024 ESU Luard Morse Finalists return to NYC for Interviews! January 2023



ESU Luard Morse Scholarship Committee with Finalists at ESU National Headquarters
2023/24 Winner, Micayla George (center)



Shang Andrews, 2022/23 ESU Luard Morse Scholar in London, ESU Dinner at the House of Commons

Travel And Learn Abroad (TLab)

Since 1957, ESU Branches nationwide have generously provided TLab Scholarships for teachers to learn abroad in the United Kingdom at Oxford, Edinburgh and Shakespeare's Globe in London.

46 Educators & Lifelong Learners in Summer 2023!

I forged true friendships with incredible teachers from across the country & returned with so much wisdom imparted by Globe educators. I'm so excited to use the TSTP activities in my classroom!

— S. Medved, NYC Branch TLab Scholar



Travel and Learn Abroad (TLab for Lifelong Learners)

One-week, educational programs, TLab for Lifelong Learners offers ESU Branch members, friends and educators interested in the English language and culture, the opportunity to live and learn in the United Kingdom.

Shakespeare's Birthplace Trust Page to Stage Program

- 1- program in July in Stratford-upon-Avon featuring:
- lectures by renowned scholars
 - behind-the-scenes tours
 - performances by the Royal Shakespeare Company & Shakespeare's Globe in London.
 - visits to Shakespeare's family homes and access to archives not open to the public
 - accommodations at the lovely White Swan Hotel



The Oxford Experience

- 1-week programs in the Humanities
July through August featuring:
- morning seminars up to 12
 - afternoons free for excursions
 - all dining & accommodations at historic Christ Church including dining at High Table



We enjoyed The Oxford Experience so much, we want to go again next summer! G. Peterson





Middle School Public Debate Program

Founded in 2011 in partnership with Claremont McKenna College, the ESU's Middle School Debate Program teaches students in grades 5-8 fundamentals of critical thinking and language arts skills through public speaking. The program is an adaptation of the parliamentary model of debate.

Students engage in weekly debate activities and all day Saturday tournaments. The ESU Middle School Debate Program had a robust season with a return to debating in-person in 12 tournaments hosted by the New York Debate League, Garden State Debate League and Jersey Shore Debate League. The ESU works closely with a dedicated team of coaches/teachers and volunteer judges to support the students.



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International Public Speaking Competition (IPSC)

IPSC brings the best young speakers aged 16 - 20 from all over the world together for a week of competition, training & cultural exchange in London. Each year, over 40,000 students from 50 countries participate.

The ESU US National Competition winner...

Receives an all-expense paid trip to London

to represent the United States in the

May 13 —17, 2024



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English in Action: EiA

EiA matches English language learners with volunteer tutors for weekly conversation practice. The program offers one-to-one conversations and group discussions.



Goals:

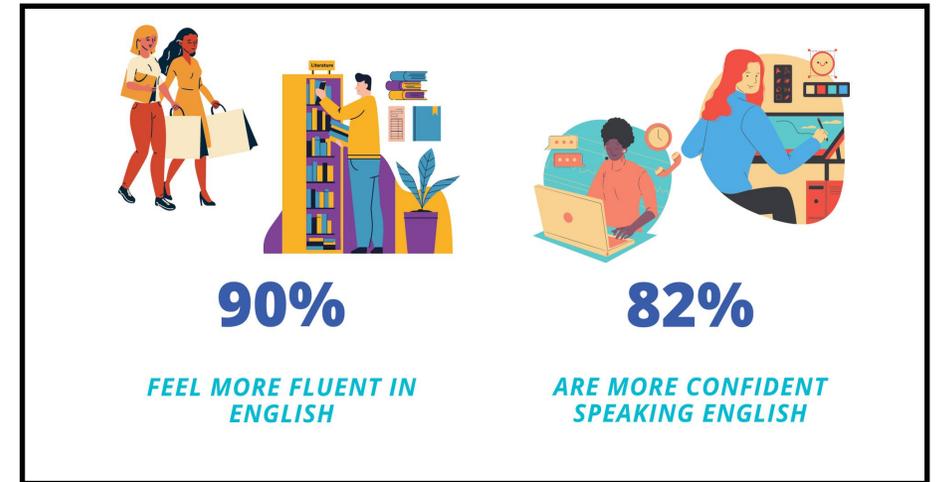
- **Increase** English language proficiency
- **Build** confidence
- **Provide** window into life in the U.S.
- **Promote** cross-cultural exchange
- **Engage** volunteers in lifelong learning

English in Action: Program Impact

Volunteers



Students



“It’s important to me to give my students a positive feeling about Americans. And they, in turn, have so much to teach me.”

- English in Action Tutor

English in Action Across America

The expansion of EiA into the branches connects new immigrants with ESU members for online weekly conversation.

- Branches recruit volunteer tutors
- ESU National recruits students
- Comprehensive volunteer training & support

Goals:

- **Grow and diversify** branch membership
- **Engage** volunteers
- **Share** culture and traditions of ESU regions
- **Connect** ESU programs



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Andrew Romay New Immigrant Center: ARNIC

ARNIC empowers recent immigrants with the skills, resources and networks to build successful lives in the U.S.



English
classes



One-to-one
conversations



Career
development



Civic & cultural
learning

ARNIC: Program Goals

- **Increase** English language proficiency
- **Build** professional and social networks
- **Remove** barriers to success
- **Promote** full integration
- **Reduce** social isolation



393 new immigrants served

60+ countries

55 English classes

1,000 instruction hours



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ARNIC: 2023 At A Glance

- Recent immigrants (less than 5 years)
- Documented immigrant status
- Demonstrated financial need
- 18+ years old
- Intermediate-level English



68% bachelor's degree or higher

58% unemployment rate

\$18,000 median income

ARNIC Impact

141 program graduates in 2023

100% report improved English

87% report professional-level English skills

93% report that they feel more at home in the U.S.

Life introduced me to ARNIC, this outstanding school with its excellent programs, teachers, and staff, who helped all my fear and ignorance disappear gradually.

-Grethell, ARNIC Graduate from Cuba



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Growth & Expansion: Workforce Development Program

A comprehensive workforce development and job-readiness ESOL program to empower low-income, vulnerable immigrants in the greater NYC area to reach their career potential.

- One-to-one professional mentoring
- Individual career advising service
- Job-readiness ESOL classes

Goals:

- **Help** immigrants navigate job market
- **Expand** professional networks
- **Develop** knowledge of U.S. business culture
- **Build** professional-level English proficiency
- **Find** meaningful professional jobs

This initiative was made possible by a major grant from **Mother Cabrini Health Foundation**

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Impact: Professional Mentoring



My mentor motivated me to turn my weaknesses into strengths. I found not only a mentor but also an angel who was with me through my most difficult moments. She was moved by love and worked hard so that the American dream does not become a nightmare for us.

-Ana, mentee from Colombia



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Evelyn Wrench Speaker Series in 2023

2023 Programming & Lectures (so far)

- **James Raven (March 11-26, 2023)**
 - *The History of the Book*
- **Andrew Halls (May 3-13, 2023)**
 - *Dickens: the Empathetic Psychopath*
 - *Was Charles Dickens a Misogynist?*
- **Andrew Lownie (September 14-22, 2023)**
 - *After the Abdication: The Duke and Duchess of Windsor in Exile*
 - *Stalin's Englishman: Guy Burgess, the Cold War, and the Cambridge Spy Ring*
 - *Literary Edinburgh*

Coming in November 2023 will be **Flora Fraser:**

- Historical biographer and specialist of archival research on women of the 18th century in Europe and America
- Fellow of the Royal Historical Society
- In 2019, awarded an honorary Doctorate of Letters by Kings College, London

Flora will present her lecture, "*Flora Macdonald: Jacobite Rebel, American Revolutionary War Loyalist*", in which she details the life of 18th-century Scottish heroine, Flora Macdonald, who famously voyaged in 1746 with 'Bonnie Prince Charlie', or Prince Charles Edward Stuart, 'O'er the sea to Skye.'



James Raven with ESU Chairperson, Dr. E. Quinn Peeper

64

branches across the country consisting of

24 MMOAs

and

40 BMOAs

3,420*

members across all branches

*as of June 30, 2023

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MEMBERSHIP 2022-2023

- Prior to June 1, 2016, branches were largely unincorporated entities with no legal status.
- LLC structure was implemented throughout the 2016-2017 fiscal year with the National Organization as the “sole member” or “single member”.
- Branches could be formed as an LLC with one of two Operating Agreements: a Board-Managed Operating Agreement (BMOA) or a Member-Managed Operating Agreement (MMOA).



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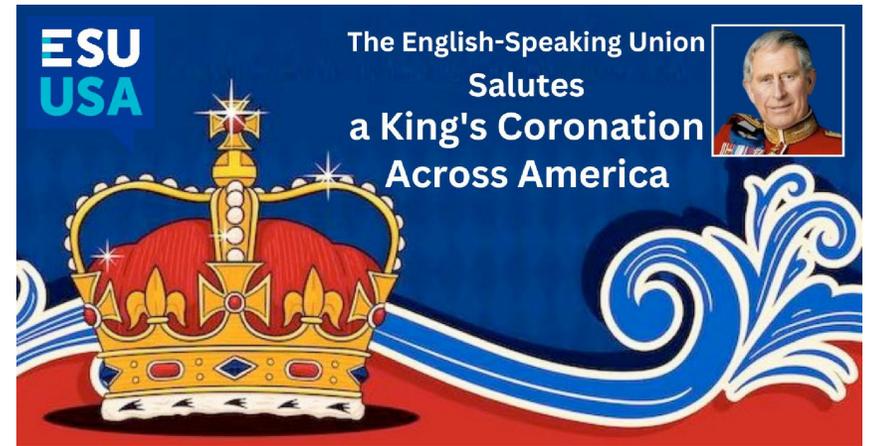
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MEMBERSHIP 2022-2023

- While branches are considered “disregarded entities” in the eyes of the IRS they still have to complete local State compliance.
- Because the branches only have tax-exempt status through the National Organization, the ESU files a single tax return instead of two returns every year.
- Branches determine their own dues levels, additional categories for giving, their own local programming and, in the case of BMOAs, control their own finances.





11-14 Speakers Annually

- Content totally curated by Branch leadership
- Registration Averages over 100 per event



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Upcoming: National Patron Tour



Veneto, Italy September 21-27, 2024



TOUR HIGHLIGHTS (Subject to change)

Verona

Chiesa di San Zeno
Chiesa di Sant'Anastasia
Casa di Giulietta e Casa di Romeo
Piazza Maffei

Lake Garda & Isola de Garda

Villa Albertini
Villa Rizzardi
Villa Canosa

Mantova (Mantua)

Palazzo Ducale
Sant'Andrea
Palazzo Te by Giulio Romano
Teatro Scientifico

Vicenza

Villa La Rocca Pisana
Villa Pisani in Lonigo
Teatro Olimpico
Museo Palladio e Centro Studi
Palazzo Chiericati

Padova (Padua)

Loggia Cornaro
Visit to Villa Barbarigo in Valsanzibio

Asolo

Villa Emo in Fanzolo
Villa Barbaro by Palladio



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Activity Level

There will be standing and walking for extended periods during visits to historic homes and museums or city tours. Guests should be sure-footed on stairs and able to walk at least one mile on paved and unpaved surfaces.

Annual General Meeting/ International Council Meeting 2024

Partnered with International Council Meeting
Cleveland, Ohio
October 18-21, 2024



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