



Chapter Handbook

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Dear Fulbright Association Chapters,

We're excited to introduce you to the updated 2017 Chapter Handbook.

This manual provides you with a brief history of the Fulbright Association, a description of the Fulbright Program, and the information necessary to develop and maintain a successful chapter. It will help your local chapter grow, develop, and continue its mission of promoting international education, engaging alumni, and playing a role in cultural diplomacy.

As this is a living document that will be revised and amended as policies and procedures are changed. We hope to continuously provide your chapter with the best possible support and assistance.

The National Office appreciates any suggestions you may have concerning the contents of this Handbook. Feel free to contact me via email at shaz.akram@fulbright.org.

Warm regards,



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About the Fulbright Association

Established on February 27, 1977, the Fulbright Association is a private, nonprofit and nonpolitical organization whose members are Fulbright Program alumni and friends of international education¹. The Association supports international educational and cultural exchange, and the ideal most associated with the Fulbright name -- mutual understanding among the peoples of the world. It accomplishes this by promoting opportunities for lifelong learning, advocacy, collaborative networking, and service at home and abroad for alumni, supporters and friends of the Fulbright Program.

The Fulbright Association currently has approximately 6500 individual members, about half of whom are lifetime members. Approximately 200 institutional members, including colleges, universities, and international educational organizations throughout the country, also support the Fulbright Association. Our 50 active chapters host more than 250 programs for visiting Fulbrighters and alumni throughout the country each year. Programs range from educational events, advocacy, panel sessions, career development seminars, and music and art presentations to global health and science conferences, local networking, and volunteer activities.

History of the Fulbright Association

In 1976, the Board of Foreign Scholarships (now the J. William Fulbright Foreign Scholarship Board) convened regional Fulbright alumni meetings to celebrate the 30th anniversary of the Fulbright Program. The Fulbright Association grew out of resolutions adopted at those meetings. Arthur Power Dudden became its founding president.

Senator J. William Fulbright also encouraged alumni to create an active constituency for the Fulbright Program. He wanted alumni to educate members of Congress and the public about the benefits of increasing mutual understanding between the people of the United States and those of other countries. He also wanted U.S. alumni to welcome and exchange ideas with Fulbrighters from abroad. Senator Fulbright had traveled from Arkansas to the United Kingdom on a Rhodes scholarship and valued throughout his life the welcome and support he received while he studied away from home.

¹ One does not have to be an alumnus/a to join the Fulbright Association. Friends of Fulbright and those in support of international education are encouraged to join.

Programs administered by the National Office

1. ***Advocacy*** – The Association advocates for increased resources for Fulbright exchanges and policies that promote international education. The Association actively participates in coalitions (such as the Alliance for International Educational and Cultural Exchange) supporting international exchanges and foreign affairs programs and provides timely legislative information to members through alerts on the Association’s website at www.fulbright.org and via e-mails to the Association’s members. Members participate in visits to Congressional Offices, along with other Fulbright community members, throughout the year.
2. ***Annual Conference*** – The annual conference is held in the fall in Washington, D.C., or at other sites inside or outside the United States. The conference features prominent speakers and panel discussions on current policy issues, discussion of advocacy, significant cultural events (e.g., the annual Selma Jeanne Cohen endowed lecture on dance history or research), the annual membership meeting, and a chapter development meeting.
3. ***Fulbright Lifetime Achievement Award*** – The Fulbright Lifetime Achievement Award honors Fulbright alumni whose distinguished careers and civic and cultural contributions have expanded the boundaries of human wisdom, empathy, and perception. Recipients of the Award show exemplary commitments to creative leadership and liberal education.
4. ***J. William Fulbright Prize for International Understanding*** – The Fulbright Prize, a \$50,000 award, recognizes extraordinary contributions to increasing mutual understanding and cooperation among people. From 1993 to 2008, the Fulbright Prize was funded through generous grants from The Coca-Cola Foundation. The Prize is now supported by the J. William Fulbright Prize Endowment, thanks to the bequest of John B. Hurford, a former officer of the Fulbright Association, and by gifts from Fulbright alumni and friends. The prize is currently awarded in even-numbered years.
5. ***The Selma Jean Cohen Fund for International Scholarship on Dance*** – This award enables a dance scholar to present a major paper on previously unpublished research at our Annual Conference. Award winners are selected based on guidelines developed by the late Dr. Selma Jeanne Cohen, dance historian and founding editor of the International Encyclopedia of Dance, whose generous endowment gift supports this lecture program.
6. ***Travel and Service Programs*** – The Travel Task Force creates a range of Insight Tours and Service Corps projects that offer travel and/or service opportunities to various parts of the world. Participants enjoy the chance to travel with their colleagues and often receive invitations to meet with Fulbright alumni in the destination country.

National Programs administered by Chapters

TEDxFulbright – Our National Office provides guidance for chapters and International Commissions/alumni associations seeking to host TEDxFulbright events. Seldom do two independent concepts connect as well as Fulbright and TEDx. The Fulbright Program nurtures mutual understanding and respect across cultures by the exchange of compassionate, socially aware individuals serving as ambassadors across all fields of professional engagement. TEDx, similarly, has shown immense promise in furthering ideas for the benefit of all societies in a way that is both personable (revolutionary story-telling) and powerful (demonstrating incredible feats of intellect, creativity, and collaboration). It is our continuing wish to provide Fulbright alumni with a TEDx framework to most effectively excite and gather others to join efforts in working for the sake of humanity’s progress. TEDxFulbright is operated under license from TED.

Fulbright in the Classroom – This program began in 2017 as a way of bringing international education into the K-12 classroom and providing early exposure to the Fulbright Program.

Pathways -- This service program encourages chapters to develop international service projects in any of five areas: international education, sustainability, global health, peace, and economic development. Chapters create a project for a particular country, identify an NGO partner in that country who can manage project planning and logistics for a one- or two-week period, and work with the National Office to finalize the MOU and register alumni as participants. At times, Pathway projects are managed by the National Office as well.

About the Fulbright Program

As alumni, you've experienced the Fulbright Program first-hand, and your story can be powerful. When you have the opportunity to talk about it, you'll need to be able to describe the Program broadly; this section of the Handbook provides you with that overview. We also encourage you to visit the website of the Bureau of Educational Cultural Affairs (ECA) for updated information. <https://eca.state.gov/fulbright>

Purpose of the Fulbright Program

The Fulbright Program was established in 1946 under legislation introduced by the late Senator J. William Fulbright of Arkansas. This highly competitive Program offers grants for U.S. graduates and scholars to go abroad and non-U.S. graduates to come to the United States to study, teach, and conduct research. Its purpose is to increase mutual understanding between the people of the United States and other countries through the exchange of people, knowledge and skills.

Funding

The program is primarily funded by an annual appropriation from the U.S. Congress to the Department of State and the Department of Education. As a bilateral program, it also receives funding from 49 partnering countries. Not only do they share costs, they also provide indirect supports, such as salary supplements, tuition waivers, and university housing, as do a number of private foundations, host institutions, and corporations inside and outside the United States. Due to the enthusiastic involvement of partnering countries and organizations, the Fulbright Program is considered one of the most successful bilateral programs in U.S. history.

Administration

This flagship international educational and cultural exchange program is primarily administered by the Bureau of Educational and Cultural Affairs (ECA) of the U.S. Department of State under policy guidelines established by the J. William Fulbright Foreign Scholarship Board (FFSB).

- The FFSB is a presidentially-appointed, independent body that sets the policies and procedures for administration of the Fulbright Program. It has final responsibility for approving selection of all grantees and supervises the conduct of the program, both in the United States and abroad. The Board is composed of twelve members drawn from academic, cultural, and public life.
- Bilateral Commissions administer the Fulbright Program in some 49 countries, assuring that grantees and educational institutions participating in the program are qualified to do so, and that they plan and propose educational exchanges that are in keeping with the needs and educational resources of each country.
- In 100 countries where there is no commission, the Fulbright Program is administered by U.S. embassies.

- The U.S. Department of Education administers the Fulbright-Hays training grants and seminars abroad programs designed to promote and improve foreign language and area studies throughout the educational structure of the United States.
- A number of private, cooperating organizations also assist with the administration of the Program.

Impact

Since it began in 1946, more than 370,000 Fulbrighters have participated in the Fulbright Program, coming from 160 countries.³ The Program awards approximately 8,000 new grants annually and accounts for 40% of the exchange program budget. International education brings more than \$21.8 billion into the U.S. economy from visiting international students and scholars.

Fulbrighters are government leaders, ambassadors, business leaders, teachers, scientists, researchers, entrepreneurs, artists, musicians, playwrights, poets, doctors, politicians, and university administrators, to name a few professions.

The excellence of the program is demonstrated by the achievements of alumni:

Political Leadership and Awards

- 57 Fulbright alumni from 14 countries have been awarded Nobel Prizes
- 29 alumni are MacArthur Foundation Fellows
- 82 alumni have received Pulitzer Prizes
- 37 Fulbright alumni have served as heads of state or government

Individuals of Recent Prominence

- **Gary Conille**, former Prime Minister of Haiti
- **John Hope Franklin**, noted American historian and Presidential Medal of Freedom recipient
- **Muhammad Yunus**, founder, Grameen Bank, and 2006 Nobel Peace Prize recipient
- **Juan Manuel Santos**, president of Colombia
- **Riccardo Giacconi**, physicist and 2002 Nobel Laureate
- **Amar Gopal Bose**, founder, Bose Corporation
- **Renée Fleming**, American opera singer
- **Daniel Libeskind**, architect

³ The Fulbright Association does not administer the Fulbright Program, nor is it involved in the selection of grantees.

Fulbright Association Chapters

Several years after the Fulbright Association was established, Association members in different parts of the country started to meet and the chapter movement was born. Chapters provided volunteer opportunities for alumni to advocate for the Fulbright Program with local members of Congress, explore international issues with their colleagues and welcome visiting Fulbright students, teachers, and scholars.

The Fulbright Association is a federated membership organization with 50 active chapters across the country. In this organizational structure, the national organization is the group within the federation to which all members belong.

The sections below outline the respective responsibilities of the National Office and chapters and provide a reference point for how chapters should be formed and managed.

Structure of Responsibilities

National Office Responsibilities

- Setting and enforcing policy, enrolling members, providing a focus for programming, and collecting dues.
- Rebating a portion of dues to the chapters.
- Maintaining the group tax exemption that covers chapters. The Fulbright Association is tax-exempt under section 501(c) (3) of the Internal Revenue Code.
- Maintaining a database of alumni and providing membership data to chapters.
- Providing advice and encouragement to chapters about shaping a program of events to serve members and extend hospitality to visiting Fulbrighters.
- Maintaining a website and newsletter, with opportunities for chapters to publicize their events.
- Managing a membership program to renew current members and recruit new members.
- Maintaining a Chapter Advisory Board (CAB) as a forum for regional chapter representatives to exchange ideas and share tools for strengthening membership, advocacy, fundraising and programming.

Chapter Responsibilities

- Following the Chapter Bylaws (see Appendix E), the Affiliation Agreement (Appendix F) signed upon formation of the chapter, and the policies described in this Handbook.
- Contacting alumni in the area to invite them to join the Association and participate in chapter activities.
- Developing and implementing annually at least two programs related to international education and cultural exchange. These programs should be designed to allow discussions of international issues among alumni and/or to welcome visiting Fulbrighters.
- Giving members the opportunity to learn, participate, and be recognized for their contributions.
- Advocating for the Fulbright Program by developing relationships with U.S. Congressional Representatives and Senators from the area.
- Submitting the required annual program and financial reports.

Forming a Chapter

Many resources are available to help you start a chapter in your state. The information below serves as an overview of the steps you will need to take to get started:

1. Discuss formation of a chapter with key Fulbright alumni to gain initial broad-based support. You should discuss with them the emphasis of your chapter. What kinds of events, advocacy, service, and hospitality will you offer? Making these decisions will give focus to your chapter. For example, Fulbright chapters are in an excellent position to promote an international perspective and world view in communities and campuses by collaborating with local individuals, campus administrators, academics and visiting international students. By including such activities, your chapter will be communicating the value of international educational exchange.
2. Contact the Manager of Chapter Relations in the National Office to request materials for chartering a chapter, including:
 - a. Chapter Bylaws
 - b. Chapter Handbook
 - c. Chapter Affiliation Agreement.
3. Carefully study the Chapter Handbook. This publication is essential in developing the activities of a chapter.
4. Acknowledge (in writing) individuals who have offered their support and endorsement for the founding of the chapter. This record may be helpful at a later date and should also be included in the chapter archives.
5. Form an organizational committee.
 - a. Include key alumni (international and U.S Fulbrighters) who have demonstrated an interest in and commitment to international exchange.

- b. Choose organizational committee members who are willing to be actively involved.
 - c. Provide written information about the Fulbright Association to the organizational committee prior to their first meeting and, as much as possible, talk with each member individually about the Association.
6. Plan an organizational meeting with the following agenda:
- a. Explain the history, purpose, and goals of the Fulbright Association.
 - b. Provide specific examples of programs, services and activities of other chapters and discuss what your chapter may do.
 - c. Describe the respective responsibilities of the chapter and National Office.
 - d. Distribute written materials describing the Association to those who have not previously received them.
 - e. Prepare a plan for forming the chapter and elicit ideas, comments and suggestions.
 - f. Call for a vote of support for the plan.
 - g. Elect officers (president, vice president, secretary and treasurer) and submit a petition for the chartering of a chapter to the National Office, including:
 - i. An executed official Affiliation Agreement (see Appendix F)
 - ii. A List of members of the Chapter Board
 - iii. A list of Chapter Officers, including contact information.

Managing a Chapter

Creating a Strong Membership

As indicated earlier, the National Office maintains membership data on alumni, using customer relationship management (CRM) software. From this database it provides each chapter with a list of alumni in their area who are potential chapter members. Some of these alumni will be active members of the Association while others will not currently be dues-paying members.

Each chapter should provide programs to attract individuals who are already members of the Fulbright Association and also reach out to non-active alumni so it can grow its roster of active members.

Membership Status

Fulbright alumni status does not automatically confer Association membership. Individuals must submit a completed membership application to the Association and pay annual or lifetime member dues to maintain membership in good standing. (Reduced membership fees are available for full-time students.) Membership entitles the individual to participate in a chapter and to vote and hold office. No person may be a member, vote, or hold office in any local chapter unless that person is a member of the Fulbright Association, in good standing.

The following individuals are eligible for membership in the Fulbright Association:

- Fulbright program participants, grantees, administrators, or other beneficiaries of the Fulbright Program or other international educational and cultural exchanges.
- Friends of international education who express a desire to further the purposes of the Association.

Colleges and universities, international organizations, embassies, and other institutions are also eligible to join as institutional members.

The National Office updates member records on a daily basis, entering a variety of membership information:

- Dues renewal
- Change of address and employment
- Relocation
- Death.

Since annual membership in the Association is based on an anniversary date, on any given day the membership roster changes. Please visit <http://www.fulbright.org/institutions-roster> for further information.

Retaining Members: *Individual Members*

Membership retention is one of the greatest challenges for chapters of the Fulbright Association. All members are volunteers and often, because of other commitments, some cannot give much time to chapter activities. However, a core of dedicated members is essential; the Association's goals of promoting opportunities for advocacy, networking, and hospitality to visiting Fulbrighters and service at home and abroad cannot be fully realized without the long-term

commitment, support and involvement of its members. To ensure the continuous active involvement of its members, each chapter must:

- Provide programs and activities that are not only interesting and educational but also meet the needs of the membership. To determine if member needs and interests are being met, every chapter should conduct regular evaluations of programs.
- Conduct periodic surveys since some members may not be attending programs and activities because they are not of interest or are not perceived to meet a personal or professional need.
- Based on evaluations and surveys, determine what types of activities are considered relevant by the majority of the members. (Large chapters may decide to offer programs targeted at different segments of their membership.)
- Consistently demonstrate and remind local Fulbrighters of the purposes and goals of the Fulbright Association in promoting international exchange and diversity. If this is effectively achieved, membership retention will increase.

Retaining Members: *Institutional Members*

Institutional members often help to create a foundation of support for chapters, providing office space, speakers, facilities for events and/or donations. These institutions may benefit from having a Fulbright Association chapter on campus as well. It's important that chapters make a connection with existing institutional members in the area and maintain the relationship.

Planning Chapter Events and Other Programs

All programs sponsored by the chapter should be designed to accomplish the specific objectives of the Fulbright Association as outlined in the By-laws. It is stated in the Bylaws that chapters should conduct at least two programs annually. An official Program Committee, appointed by the Chapter president, should be responsible for planning, implementing and evaluating programs. When possible, it is a good idea to plan programs for the entire year, thus addressing several objectives. For example, a newly formed chapter may want to plan a social event at the beginning of the year to bring people together and promote networking among Association members, visiting Fulbrighters and prospective members. A second program might include a panel of local experts discussing an international issue of interest.

To conserve resources, your chapter might also consider co-sponsoring educational programs with international student or study abroad offices on various campuses in the state. Co-sponsoring programs with international organizations in the community, such as Rotary International, is also a possibility. Good program development requires careful planning.

1. Types of Programs

Generally, programs sponsored by the chapters can be divided into these main categories: academic, cross-cultural, and social. The categories, their primary objectives and specific examples are listed below:

➤ Academic

- Panels and Debates: A panel of experts, single presentation or a debate provides the opportunity for information-sharing and discussion on internationally significant issues. An issue should be selected; then distinguished speaker(s), faculty and/or students could be invited to participate as presenters. Such a program increases understanding of the topic and stimulates discussion, promotes leadership development of participating students, and increases the visibility and credibility of the Fulbright Association and the Fulbright Program.
- Speakers' Bureau: A speakers' bureau can be organized by asking members to speak upon invitation from a social, civic or educational group in the community or region. It is important to identify a member who will be responsible for receiving requests and inviting speakers. Initially, this contact person will need a membership roster that lists areas of expertise and/or nationality. The creation of a speakers' bureau could address several objectives of the chapter: increase visibility and credibility, provide information, promote understanding, stimulate interest and involvement, and (for Fulbright students and scholars) provide opportunities for leadership development.
- International Exhibit: An international exhibit could be planned in cooperation with international Fulbright students on campuses, local businesses or international organizations operating in the chapter's jurisdiction. The exhibit could feature arts, crafts, clothing, photographs, audio-visual presentations and other materials representing countries/cultures. Food samples could be given out or sold for a nominal fee. Students are often successful in obtaining materials from embassies or consulates. The individuals representing the countries should be present at the exhibit to answer questions. Personal invitations can be sent to local elementary and secondary schools. This program can be jointly sponsored with students preparing the exhibit and chapter members making the logistical arrangements, preparing the publicity, and coordinating the event. By adding a nominal admission charge to the exhibit, this event could also serve as a fundraising project for the chapter.
- Forums: International forums can be quite successful in promoting international exchange and cross-cultural understanding. Often these programs are most successful when regularly scheduled (weekly, bi-weekly, monthly) and in the same location. Programming over the lunch hour is sometimes effective. Selecting a regular time and/or a clever name for the program may help people remember the event, for example a "Second Thursday Seminar" if it is a monthly event. Topics for discussion should be carefully chosen to address multicultural or world issues of current importance. Other programs may include the following: discussion groups, foreign film festivals, lecture series, and recognition of special international events (i.e., International Education Week, International Women's Day, and World Hunger Day).

➤ Cross-Cultural Programs

- **Workshop on Cross-Cultural Communication:** Members can offer their expertise in the area of cross-cultural communication by providing workshops to local community leaders. These workshops can be designed for specific professionals or local university students. The purposes of the workshop would be to provide information about international students, highlight cultural differences and communication styles, and promote understanding of these cultural differences. These goals may be achieved through a combination of handouts, lectures, discussions, role playing, perception activities, simulation games and completion of a cultural inventory.
- **Travel Abroad Network:** Establishing a travel abroad network is a good way to develop close communications and networking among members and promote cross-cultural understanding in the local community. Members who have traveled and lived abroad could serve as resources for others planning to travel to the same locations. International student members might be particularly interested in providing travel information about their countries. Posters and brochures can usually be obtained from travel agencies and foreign embassies. A member should be identified to coordinate this program, keeping the list of countries and volunteers and serving as a contact person.
- **Culture Library:** The chapter may decide to become a resource for the community on information about different cultures, thus encouraging cross-cultural understanding and visibility in the community. Culture kits/packets can be developed that include a variety of information and materials about each country, such as the following: posters, brochures, pictures, slides, flags, pamphlets and brief written overviews of the countries. Materials can be collected from several sources: embassies, consulates, travel agencies, contributions from members, and from Fulbright students returning to home countries during vacation periods. The chapter would need to locate space for the collection and designate a "librarian" to be responsible for checking out materials. If the chapter does not have a place to house the materials, an arrangement might be made with the local public library, whereby the chapter collects the materials and then donates them to the library. These materials could also be used by members involved in a speakers¹ bureau.

➤ Social Programs

- **Coffee Hour/Happy Hour:** The international coffee hour serves as an informal setting for the communication and exchange of ideas among individuals who are interested in international education and interchange. It helps bring together individuals sharing international interests so that they can become better acquainted. A regularly-scheduled time (weekly, bimonthly, or monthly) is most successful in promoting continued attendance. All interested members of the community should be invited to attend. A different culture or the international

experience of a member could be highlighted at each coffee hour, with refreshments, exhibits and music representing the culture.

- **Field Trips:** The chapter might organize field trips for members to attend events of international significance such as lectures, meetings of state government officials concerning international topics, councils and consortia investigating international issues, a symposium at other institutions and/or programs sponsored by other Fulbright chapters in the region. Such trips can create opportunities for exchange among members in addition to increasing the visibility of the chapters and providing information for members.
- **Receptions:** Receptions may be planned as primary events or with another program, such as a lecture, symposium or film festival. For example, the chapter might plan a reception in conjunction with a program sponsored by an academic department or campus international office. The purpose of such a joint-sponsored program might be to increase networking and visibility on campus.

Other social programs may include teas, theme parties, tours, potluck dinners and banquets.

A process for planning programs is provided in the box on the following pages.

Process for Planning a Program - Page 1

The following ten easy steps for planning a program (adapted from Blimling & Miltenberger, 1981) should be helpful in efforts to promote international exchange:

1. Assess needs and generate ideas for programs.
2. Set program objectives.
3. Involve others in the formation of ideas and the organization of programs. For example, review the event at a chapter board meeting or discuss with board members so that the event is:
 - Consistent with Fulbright Association goals
 - A valuable idea
 - Manageable as a volunteer effort
 - Feasible given the commitment of individuals, funds, time, and schedule
 - Mapped out into a timetable of tasks
 - On an acceptable date and at an appropriate venue
 - Reasonable in cost. (Gain Board approval for any payments. Check several caterers for best prices. Request written confirmation of items, time of arrival, back-up phone number, caterer presence (or not), clean-up, payment method (e.g., check).
4. Complete the event plan:
 - Name and purpose
 - Main facilitator(s)
 - Target audience
 - Approximate date/venue
 - Refined timetable of tasks, with event assignments and completion indicated
 - Cost
 - Sources of revenue
 - Numbers of volunteers needed
 - Agenda for the event day
 - Materials needed for the event day
 - Pre-event advertising/notification, with dates
 - Volunteers for the day, with their assignments
 - Venue, with any payments needed
 - Catering, if applicable
 - Audio-visual and speaker systems, if needed.

Process for Preparing a Program – Page 2

5. Publicize the program.
6. Review your program plan and check that everything is being done, including:
 - Folders with information about this event, with the Fulbright Association membership information form, the local chapter initiatives, and volunteering
 - Registration forms for this event, with any pre-registered names
 - Evaluation forms
 - Brochures of relevance to the event, the Fulbright Program, or other Fulbright initiatives
 - Volunteer recruitment/support
 - Gather email addresses and phone numbers of volunteers.
 - Send volunteers their assignments as far in advance as possible.
 - Gain written commitment, if needed. Make sure volunteers are recognized on day of event
 - Post volunteer assignments on site.
 - Revise agenda for event day
 - Advise main planners to be on site an hour beforehand
 - Assemble materials needed for event day.
7. Arrive early to prepare for the program:
 - Put up directional signs
 - Set up materials on tables
 - Check that all is unlocked
 - Double check with caterers
 - Distribute materials, if needed
 - Greet early birds.
8. Participate in the Program.
9. Evaluate the Program.

Evaluation of Programs

Evaluation of each program is needed. A brief evaluation form can be distributed at the close of each event or an online survey can be used.

In addition, the Program Committee should meet to evaluate the programming in general after the last event of the year. (Alternatively, the chapter officers could complete this evaluation.) Although sometimes overlooked, evaluation is necessary to determine whether the chapter is working towards its goals and whether program objectives have been met. The results of evaluation can then be used to make decisions about future plans and programs.

The following questions can be used to stimulate discussion:

1. Are programs addressing the chapter's goals?
2. Have all resources, human and material, been identified and are they being used?
3. Is the chapter addressing the needs of the membership?
4. In general, does program attendance meet expectation?
5. What changes are needed for the next year, if any?

This annual evaluation will prove to be of great help to chapters in submitting annual reports and grant applications to the National Office.

Communicating with Members, Potential Members and Visiting Fulbrighters

Communication is essential to a chapter's efforts to attract and sustain participation. Fulbright alumni in the chapter's area need to be aware of its existence and of its programs. To retain interest, chapter leaders should plan communication to members in their area (seeking feedback on their interests), then publicize events and activities to reach the broadest possible audience. Increased visibility in the community will attract not only Fulbright alumni, but also the public at large, and will help to educate fellow citizens on the importance of the Fulbright Program and of international education.

Since the National Office of the Fulbright Association maintains lists of all current members, institutional members, visiting Fulbrighters, friends of Fulbright and nonmember alumni, we can efficiently process communication for chapter emails, event announcements, electronic ballots and press releases. The National Office has templates that can professionally shape chapter announcements in a format consistent with the Fulbright Association identity. We encourage you to take advantage of our services and send all material for reviewing in advance.

Please note there are three categories of visiting Fulbrighters—scholars, students, and teachers. Students and teachers are generally in the United States for an academic year. The scholars come and go all year long and may move frequently. The organizations listed below are responsible for administering the Fulbright Program for foreign Fulbrighters.

- The Council for International Exchange of Scholars (CIES) administers the exchange program for research scholars and lecturers from abroad.
- The Institute of International Education (IIE) supervises foreign Fulbright student grantees and administers the Hubert H. Humphrey Fellowship Program.
- America-Mideast Educational and Training Services (AMIDEAST) arranges for study programs for Fulbright graduate students from selected Middle Eastern countries.
- The Latin American Scholarship Program of American Universities (LASPAU) affiliated with Harvard University, administers exchanges with Latin American and Caribbean countries for training university faculty members.
- The Academy for Educational Development administers the Fulbright Teacher Exchange Program.

Working with the U.S. Department of State’s Bureau of Educational and Cultural Affairs, the National Office collects the information on visiting Fulbrighters each fall and distributes it to the chapters. This centralized process enables the National Office to include visiting Fulbrighters on all electronic announcements chapters send throughout the year. Visiting Fulbrighters are also able to update their contact information in the Fulbright Association’s online community as needed, thus reducing the amount of administrative work for chapters. (Please see Appendix C: Usage Guide for Contact List.)

Channels of Communication

1. Email: By far the most-used channel of communication is email. If your chapter would like assistance in sending email announcements, the National Office can help.

➤ *Event announcements*

Guidelines for Submitting Event Announcements to National Office

1. The National Office can assist chapters in promoting events through electronic media only.
 - Invitations for events to be mass emailed should be sent via email to the National Office one week in advance. If the chapter would like to have the event added to the national calendar so that members from other chapters can attend, please submit the announcement a month in advance to allow for maximum publicity. The inclusion of all programs on the national calendar assists individual chapters in finding new and useful ideas to build their programming and gives the Fulbright Association an appropriately robust image.
 - One-page flyers and/or photos can be attached with the email sent. Event flyers need to include date, time, location, local chapter contact information, and the Fulbright Association logo.
2. If planning a special event, chapters can request that the National Office print material. Such requests must be submitted one month in advance, to allow enough time for printing and shipping. However, we encourage chapters to conduct most of their communications electronically.

➤ *Questionnaires and Ballots:* The National Office will also provide emailing of ballots and questionnaires. Some chapters use questionnaires to learn what kinds of programs or activities their members (and nonmembers) would like the chapter to plan. Chapters also hold elections by electronic ballot. The Fulbright Association uses its Survey Monkey subscription to produce a questionnaire or ballot and provide chapter leaders with the correct URL to include in emails announcements. On the

closing date for the survey, the National Office will export an Excel spreadsheet of all results to the chapter.

2. *Facebook.* In addition to email announcements of events we encourage chapters to use the full range of options for communicating with members, potential members and visiting Fulbrighters. For chapters that don't currently have a presence on Facebook, we recommend you create a Facebook Group, to share important updates directly with members, potential members and visiting Fulbrighters and to engage in discussion within the space of the group. To create a Group:
 - a) From your home page, go to the Groups section on the left side menu and click Create Group.
 - b) Click + Create New Group at the top of the page. A window will appear where you'll be able to add a group name, add members and select the privacy settings for your group.
 - c) We recommend that you set the privacy to "open" so that non-members can view content posted by the group. If you do not want to set the group to "open," we recommend "closed" over "secret," so nonmembers will be able to find the page and become members easily.
 - d) Click Create when you've finished.

3. *Twitter:* A Twitter account can be useful when you want to briefly alert chapter members and the National office to current activities, such as a visit to the local office of a Congressional Representative or Senator. To create a Twitter account:
 - a) Go to <http://twitter.com> and find the sign up box, or go directly to <https://twitter.com/signup>.
 - b) Enter your full name, phone number, and a password.
 - c) Click Sign up for Twitter.
 - d) Once you've clicked Sign up for Twitter, you can select a username (usernames are unique identifiers on Twitter). We recommend you choose the same username as your Facebook group name.

If your chapter starts a new account on Facebook or Twitter, please let us know and we'll create a post on our profiles, welcoming you to the digital space. We also request that chapters "like" the Fulbright Association Facebook page and follow us on Twitter.

4. *eNewsletters/Blogs:* We also encourage chapters to develop eNewsletters or blogs as an outreach mechanism for their members. It's one of the most effective means of publicizing local chapter activities, events and programs. It's also an excellent way to recognize the contributions of chapter members and relay information from the National Office. Possible content for chapter newsletters include:
 - A calendar of local, regional and national events related to international education, local outreach and exchange.

- Reports on local board activities
 - Profiles of outstanding member contributions.
 - Photographs of past/current events sponsored by the chapter.
5. *Chapter Websites and/or Pages on Fulbright Association Website:* Some of our chapters develop their own websites, but any of our chapters are welcome to set up their own pages on the Fulbright Association website. Please contact the National Office for instructions.

For information on how to use the blogging platform WordPress to create your own chapter website, consult this link <https://en.support.wordpress.com/using-wordpress-to-create-a-website/>

6. *Press Releases and Articles:* Chapters should use the National Office resources for all press releases and broadcasts so we can present a single face to the public. We encourage you to draft press announcements to the following and submit them to the National Office for release: regional and local newspapers; community television broadcasts; educational, religious, civic, social, and business group bulletins. “Lost” Fulbrighters and prospective individual and institutional Association members are often discovered when announcements of chapter programs are sent to internationally-oriented universities, businesses, and other local groups.

Developing an Advocacy Program

Advocacy is part of our mission and extremely important in sustaining funding for the Fulbright Program. Advocacy can take place in many ways, but the central goal is to build such strong relationships with your Congressional Representatives and Senators that they recognize you when you walk into a room. This relationship-building usually begins when a chapter invites these representatives and/or their staffs to chapter functions. The relationship grows when chapter members visit the local offices of these representatives while the House and Senate are in recess. The National Office can assist with providing up-to-date email addresses of elected officials for chapters and a congressional calendar that designates recess dates for the current year. The National Office also offers webinars to guide you in making these visits and communicating important facts about the Fulbright Program. Please remember that the Program is funded by the U.S. Department of State, and we want the support of all citizens in our country. It’s essential that we remain nonpartisan.

Meeting Banking and IRS Requirements

Careful adherence to the following requirement is essential:

1. *Employer Identification Numbers (EIN):* Every Fulbright Association chapter must have an Employer Identification Number (EIN) from the IRS. This is also known as a Federal I.D. number. This number is required by the IRS to maintain the Group Tax Exemption and is also required to open a bank account. To apply for an EIN, you must fill out an

SS-4 form, which is available from the National Office or from the IRS on line (www.irs.gov). A copy of the chapter EIN authorization from the IRS **must be filed** with the National Office.

2. *Group Tax Exemption:* The Internal Revenue Service has granted a Group Tax Exemption to the Fulbright Association that covers all affiliated chapters. (The Group Exemption Number (GEN) is 3460.) Please contact the National Office for a copy of the letter of ruling. Chapters are exempt from federal income taxes and fall under the National Organization's 501(c) (3) status. The National Office maintains the Group Tax Exemption for chapters whose annual revenues are less than \$25,000. All chapters need to complete a tax form 990N, and will be notified about the procedure to complete this form beginning in February of each year. A copy of each chapter's Form 990N **must be filed** with the Treasurer of the Fulbright Association annually.
3. *Taxes:* While the chapter is exempt from federal income taxes, it may be subject to local taxes on goods and services, unless it applies for and receives sales tax exemption at the state and local levels.
4. *Bank Accounts:* Each chapter opens and maintains its own bank account in the name of the chapter. The correct name is _____ Chapter, Fulbright Association. The chapter may need to provide its EIN to open an account. The President and the Treasurer should be authorized to sign checks and authorize other transactions. Bank accounts **must not be opened** in the name of an individual or another institution.
5. *Fiscal Year:* The chapter fiscal year must be the calendar year.

Optimizing Revenues

The Fulbright Association is working to help chapters build their financial resources so they can offer a rich slate of activities in their areas. The following are the sources of revenue available to chapters:

1. *Rebates from Membership Fees:* Chapters that have operated under the guidelines in this handbook and according to the Chapter Bylaws and that submit their annual report each year (due on February 15) will receive a 10% rebate from the dues of every new/renewing member in the area (excludes lifetime members after the first year of joining).

The annual report must include the following documentation:

- Local chapter financial report (forms available from the National Office)
- Bank statement as of the prior December 31
- Minutes and reports of board meetings
- List of current chapter officers and directors
- Chapter mailing list and a list of participants from past events
- Brief description of chapter activities during calendar year

- Evidence/description/result of advocacy efforts.

All of these documents must be included in the Annual Report for the year ending December 31 and which is due by February 15th of the following year.

2. *Fulbright Chapter Grant Program:* Funded by the State Department's Bureau of Educational and Cultural Affairs (ECA), the Fulbright Chapter Grant Program supports Fulbright Association chapter programs that enhance the exchange experience of visiting Fulbrighters by creatively utilizing unique local resources and strengthening the Fulbright network of alumni, visiting Fulbrighters, and potential applicants. Grants of up to \$8,000 are awarded on a competitive basis exclusively to Association chapters and to groups in the process of becoming affiliated as chapters. The proposals are due in August of each year to support activities that will take place during the following academic year.

Please be aware, however, that ECA funding is affected by any budget cuts to the Bureau that may occur. We encourage chapters to begin developing other revenue sources to offset this possibility.

3. *Event and/or Activity Fees:* To cover related expenses, chapters may charge event fees for specific programs and/or an annual activity fee. To avoid confusion about the membership structure of the Association, **activity fees must not be called dues.** In addition, if a specific chapter program involves fees, the costs for nonmembers must be higher than the cost for members (at a recommended level of 30% higher). However, if possible, visiting Fulbrighters and their immediate families should be admitted free of charge or charged only nominal event fees.
4. *CIES Occasional Lecturer Program:* The Council for International Exchange of Scholars (CIES), with funds from the State Department, makes available limited support for round-trip transportation for international scholars who accept lecturing invitations. Although used primarily by colleges and universities, assistance through the Occasional Lecturer Program (OLP) may be available to Fulbright Association Chapters with thoughtful plans for a program that includes visiting Fulbright scholars. (*Our scholars can go to campuses to speak or request visiting Fulbrighters to their campus, IIE covers their travel cost*). Chapters can also invite scholars during International Education Week November 13-17 (*dates vary per year, but mostly in second week of November*) or celebrations at local universities. Please contact the National Office to discuss your ideas.

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This Chapter Handbook was revised in June 2017 to capture innovative programs and changes in how the Fulbright Association and its chapters operate. The following appendices provide reference points for chapters to learn more about how to grow and thrive as an essential part of our organization.

Appendix A: Administering Chapter Pages on Fulbright Association Website

Group Administrators

Our website provides flexibility for group pages, access to member information, and the ability of the chapter to reach out to its members at their convenience. Below is a guide to the options available and how to perform tasks. The format is very user friendly and often explains categories and questions it asks of administrators. Confused by a certain category? Click on the icon to get an explanation. Exploring the chapter page and the options available to you is the best way to learn how to administer your chapter page; we encourage administrators to look through the options before populating your chapter page and learn what is available.

Getting Started

Those designated as group administrators (two individuals per chapter) will have access to group page functionality not seen by normal members. To access these options, login with your username and password. If your chapter has not designated a chapter administrator yet, contact Shaz Akram in the National Office. Chapters are responsible for maintaining their chapter group page. We encourage chapters to make this page as robust as possible as this is often a member's first and lasting impression of the chapter. Once you are logged in, you will be able to see this top toolbar: [Group Admin Options](#) [Change Homepage Layout](#) [Resource Manager](#).

Content Management allows you to manage the content of your group page. You can add a short description of your chapter, change the look of your homepage, and determine what features you want our members to see. You can also add custom pages as needed.

The File Library allows you to create collections of files that can be used on your custom pages; for example, you could create an event page and then place flyers on that particular page.

Calendar Management will allow your members to see what's happening at any given time in your chapter. You have the option to add dates and events to your calendar for such things as a regular or reoccurring chapter meeting that is merely informative, with no registration required. Adding an event allows even more information, such as giving members the option to register, adding a picture or logo, and providing detailed descriptions. This would be ideal for speaker events, an annual gala, or another large event.

Photo Management allows you to create photo albums for specific events and post to your chapter page. Any member can submit photos, but group administrators will need to approve or decline pictures that have been submitted for upload. This process helps manage the image of the chapter and preventing viewers from having to shuffle through many shots of the same thing. Administrators can view pictures based on their status as well; just select the option you want from the menu (pending, accepted, rejected).

Blog Management allows you to create an ongoing blog for your chapter. On the View Blogs page you can determine the order for your blogs, view pending entries, and configure blog entries. Configuring the blog allows you to determine who can submit blog entries (anyone or just administrators), whether entries are auto-approved or not, who can comment, and whether or not blog entries can be scored.

Each chapter already has a default blog with the chapter name. You can change this name in “options” or choose to add even more blogs. Think of blogs like a regular newspaper column; they are intended to convey news or opinions. To have a “conversation” with your members on a topic or solicit opinions, consider using the Forum feature.

Forum Management allows members to start conversations with one another on a particular topic and allows administrators to solicit help or opinions and bring information to chapter members’ attention. Examples of Forum categories are “Travel Advice,” “Presenting Research,” or “Miscellaneous.” Through these forums members can ask anything from “Can anyone recommend a good art exhibit to see?” to “Does anyone have advice on applying for another Fulbright grant?” Over time, chapters can add forum categories that work best for their members. Just be sure you note in your discussion rules that offensive language and harassment of other members will not be tolerated and that you reserve the right to delete a post deemed offensive. As with blogs, administrators can determine the order in which the forums appear, whether or not they can be scored, and whether or not they can be locked.

Member Management is perhaps the most popular feature. Administrators will be able to view member information in real time (the member database feeds this information and provides the most current member status), search for members within the chapter, and view member contact information. Although administrators can technically remove a member from the group, we urge you not to use this feature. Members self-select their chapters and while you might not think a member belongs in your chapter, there may be a very good reason they are there. If you have any questions about a member’s status, contact the National Office. Although you are given the option to search for pending members, members are automatically approved into chapters and therefore, you should not see anyone in this category. You cannot run a spreadsheet of your members and their contact information, but should you need one, please contact the National Office and we can do that for you. However, you can contact all of your members through the next option, Member Communication.

Member Communication gives administrators a way to contact all their current members through messaging or emailing. (Please note that members who are lapsed cannot be contacted this way as it is considered a member benefit.) Messaging sends a message to that person’s online profile. Emailing sends the message directly to the email that person has on file. Emailing is the most direct way to communicate, but please be aware that not all members have an email on file (or an email address at all). Also be careful not to overwhelm your members with emails; the number one complaint from chapter pages is “too many emails.”

Change Homepage Layout allows you to customize your chapter page(s). Click on the Change Homepage Layout icon in the top rail to view your options, such as right or left rail, header, and welcome message. This is a great place to start as you build your chapter presence.

Resource Manager allows you to upload pictures, documents, and other files that you can then insert into your chapter page(s). Before any picture or document can be inserted into your page, you must first upload it to the Resource Manager.

Appendix B: Applying for Chapter Grants

Chapter Grants are administered by the National Office. They support Fulbright Association chapter projects that:

1. **Enrich the exchange experiences of visiting Fulbrighters** by exposing visiting Fulbright students, scholars, and teachers to unique aspects of the chapter's local community, state, or region.
2. **Create and support U.S. alumni engagement** to:
 - Further the Young Professional Network Initiative by recruiting and engaging more young Fulbright alumni.
 - Further the Diversity Initiative by recruiting and engaging more diverse alumni.
 - Strengthen the Fulbright network of alumni in support of the Fulbright program itself.
 - Partner with other organizations in the community in conducting chapter Proposals are invited for one or both types of programs, events, and activities: Chapters may apply for funds to conduct any or all of the following categories of programs.
 - Activities thereby promoting the Fulbright brand.

Guidelines are provided below about drafting proposals for each type of grant.

Guidelines for Enrichment Programs:

Enrichment programs are strongly encouraged that provide opportunities for visiting Fulbrighters to learn about, and interact with, minority (racial, ethnic, religious, etc.) groups and to understand the contributions of these groups to the community and to the United States.

Planned activities must offer exposure to something unique to the local community, state, or region. Activities must be those that visiting Fulbrighters could not easily do on their own, such as a "behind the scenes" event or tour. Programs should bring visiting Fulbrighters into contact with a variety of local institutions, both civic and cultural, with U.S. alumni, and with other local community resources. Activities might include:

- Visit to a local historical site, attendance at an arts performance featuring a Fulbright alumnus/a, or a lecture provided by a U.S. Fulbright alumnus/a on a relevant topic
- Attendance at a sporting event that includes a visit with the players, coaches and/or management
- Participation in a local festival or holiday event at a local house of worship
- Tours/activities (architectural, historical, cultural, etc.) that **emphasize the diversity of a city/town/community and its history and may include a lecture by a Fulbright alumnus/a.**

Visiting Fulbright scholars in the **Boston, Los Angeles, New York City, San Francisco, and Washington, D.C.**, areas are already served by Department of State-funded enrichment programming. **Proposals from chapters serving these metropolitan areas should not duplicate programs already in place and need to show collaborative efforts with existing enrichment programs.** Please contact the National Office for more information.

Alumni Engagement Programs Guidelines

Proposals for these grants may include one of the following:

Focus on Diversity. Recruit diverse Fulbright alumni to join the Association and to actively engage in chapter activities, including governance. Key activities would be to expose and inform underserved U.S. populations (racial and ethnic minorities) and people in underserved geographic areas (particularly in Appalachia, the Deep South, the Great Plains and the Southwest) about the value and purpose of the Fulbright Program and its opportunities and benefits. Target audiences should include students, faculty and staff at Minority Serving Institutions of Higher Education (MSIs) and community colleges in the chapter jurisdiction. Promoting opportunities for potential applicants could be through presentations, workshops, advertising, other publicity efforts, working with Fulbright advisors on campuses, education abroad offices, diversity-related offices and student/faculty organizations and other academic organizations.

Focus on Young Professional Networking. Recruit young Fulbright alumni (including newly-returned U.S. Fulbright student alumni) to join the Association and actively engage in chapter activities, including governance. Consider developing a Young Alumni Committee within the chapter. Provide professional and personal networking opportunities for young alumni through such activities as mentoring, seminars, job shadowing, and social hours.

Focus on Community Engagement. Promote the chapter, the Fulbright Association and the Fulbright Program itself through activities done in tandem with local community professional, social, religious, service and business organizations, NGOs, colleges and universities, and media outlets. Activities might include speaker's bureaus, volunteer and public service activities, global (K-12) classroom efforts, media activities, and StoryCorps.

Appendix C: Guide for Use of Membership Contact List

To help chapter leaders reach their constituent members, each chapter will be provided a membership contact list on a semi-annual basis detailing each member in good standing. This list will include the following fields:

- First name
- Last name
- Fulbright type (if known)
- Fulbright year (if known)
- Fulbright location (if known)
- Primary phone number
- Primary Email address

General Usage Guidelines

- Lists are to be used only by chapter leaders on behalf of the Fulbright Association, Inc., and strictly for chapter-related business specific to the chapter’s geographic region.
- To be eligible to view or use this list, chapter leaders must be members in good standing.
- Dissemination or reproduction of third-party information is strictly prohibited without consent from the Fulbright Association National Office.

Examples of Appropriate List Uses	Examples of Inappropriate List Uses
Chapter event announcements	Political/government agendas
Chapter/Member news	Solicitation
Job postings	Distributing third-party information
Networking (e.g. mentoring, social media)	

Useful Protocols for list Usage

- When sending an e-broadcast via server email systems (Outlook, Yahoo!, Hotmail, University systems, etc.), each recipient should be blind carbon copied (Bcc’d) for privacy.
- Please copy shaz.akram@fulbright.org on all chapter emails.
- When sending a message to multiple lists, e-mail all of the lists at once to avoid duplicate messages being sent to users.
- Many e-mail programs limit the size of attachments, or limit the total size of the user’s inbox. Do not send large attachments or e-mails with graphical treatments that require large amounts of memory. A good rule of thumb is under 10 MB.
- It is inappropriate to send charitable or other solicitations to the group.

By signing the form, you agree to the above usage guidelines.

Name: _____ Email: _____
 Chapter: _____
 Phone Number: _____ Date: _____

Appendix D: Use of the Fulbright Association Logo



On March 4, 1993, the J. William Fulbright Foreign Scholarship Board (FSB) approved the official logo of the Fulbright Program. What appears above is a derived logo for the Fulbright Association based on the official Fulbright logo. This is the official logo of the Fulbright Association.

The following instructions are intended to provide consistency in the use of the logo on promotional and informational publications and other material by authorized organizations, described below. The Board of Directors of the Fulbright Association encourages authorized organizations to use the logo on all appropriate material related to the Fulbright Association programs. For additional information on use of the Fulbright Association logo, please contact the National Office.

Authorized Use/Users:

1. The logo may be used on applications, stationery, pamphlets, brochures, posters, lapel pins, business cards, name tags, conference folders and other products used in the course of conducting the business of the Fulbright Program. It should be used in ways commensurate with the prestige of the Fulbright program. It should not be produced as a decal or sticker or by any other method, which would enable it to be used by unauthorized individuals or organizations.
2. Only authorized organizations may use the logo. These include but are not limited to the United States Department of State, Public Affairs Sections of United States Embassies, Fulbright Association National Office and chapters, binational Fulbright Commissions/Foundations and cooperating agencies (for their Fulbright programs only).
3. The Fulbright logo may be used for Fulbright programs only. It may not be used for other U.S. Government exchange programs or for other non-Fulbright exchange programs managed by Fulbright Commissions/Foundations, cooperating agencies, etc.
4. Other organizations may apply for the right to use the logo; their requests will be considered on a case-by-case basis. It is possible that permission would be granted for a specific Fulbright purpose or project conducted by an organization other than one of the “core” organizations describe above.

Ink/Color:

- The Department of State and the FSB recognize that different inks are used by different printers, here in the United States as well as abroad. We therefore are not specifying a particular ink brand name or number.

- In addition to black, white may be used on colored paper. Also, gold and silver **foil** may be used on certificates or special documents.
- Authorized users of the logo should use colors, which may be described as clear, strong and pure.
- The logo must be one color, i.e., the word “Fulbright” and the globe cannot be two different colors.

8. Color must be applied as in the above sample, i.e., letters and globe must be “filled-in”, not simply outlined in color.

Font:

9. The typeface, *Friz Quadrata*, has been modified by the designer, and must be used as is. No other typeface can be used.

Size/Placement:

10. The size of the logo should be in proportion to the page or the product on which it appears. On an 8½ by 11" page, the logo should be about 1½" wide (4 centimeters on an ordinary sheet of stationery). For lapel pins, the size should not be less than 5/8" or 1.5 centimeters.

11. The globe must be of the specified proportion to the name “Fulbright.” The proportion must be maintained as the size of the logo increases or decreases, i.e., neither the globe nor the name can be made independently smaller or larger.

12. The logo must be used as a logo only, not as part of any text, headline, title or other design. It may not be used, for example, on the cover of a booklet as part of the title, “The Fulbright Program.”

13. The logo must be used upright, i.e. not placed on a slant or on its side or in any other position.

14. The logo should not be used abutting other logos or designs but remain distinctly separate. It can be used, for example, on the bottom of a page if another logo is used at the top. Or it may be used in the top right-hand corner of a page (or left-hand corner) if another logo is to be used in the opposite corner.

Contact the National Office for a vector copy for your chapter use. The Fulbright Association created this logo to be consistent with the State Department Fulbright logo.

Appendix E: Chapter Bylaws



Chapter Bylaws

Article I – Purposes

The Chapter shall be a chapter of the Fulbright Association, Inc. (the “Fulbright Association”), shall be known as and identified as such, and shall conduct Chapter activities in accordance with the Chapter Affiliation Agreement entered into between the Chapter and the Fulbright Association, these Bylaws and the Chapter Handbook.

The purposes of the Chapter are the same as the Fulbright Association, including but not limited to:

- Support and promote the mission, purposes and programs of the Fulbright Association and strengthen and increase international educational and cultural exchanges among nations.
- Assist in arranging hospitality and other services for foreign participants in the Fulbright program and other international educational and cultural exchanges in the United States and host institutions.
- Collect, receive, and disburse funds for the achievement of any of these purposes.
- Arrange meetings of Fulbright alumni in the area of the Chapter, and generally perform any services that will encourage and expand international educational and cultural exchanges among nations.

Article II – Membership

- The membership criteria will be established by the Fulbright Association.
 - Any member in good standing of the Fulbright Association may be a voting member of the Chapter.
 - All Chapter members must be members of the Fulbright Association.
 - The members shall pay dues to the Fulbright Association and not to the Chapter, but Chapter members may pay program fees or other charges to the Chapter as prescribed by its Board of Directors from time to time.

- Any member who fails to meet any obligation or make any payments due to the Chapter or to the Fulbright Association shall have his or her membership privileges suspended.
 - Suspension shall continue until such obligations are met or all sums due are paid, whereupon such privileges may be reinstated.
 - Any member may be terminated for adequate reason by a two thirds vote of the Board of Directors of the Chapter.
 - Failure to pay required fees or assessments is presumed to be adequate reason for termination and does not require advance written notice to the member.
 - Any member proposed for termination for another reason shall be given advance written notice including the reason for proposed termination, the opportunity to contest the proposed termination in writing or in person before the Chapter Board of Directors, and final written notice of the Board's decision.
 - Withdrawal, suspension, or termination of any member shall not relieve such member of any obligations previously existing, which shall continue to be due and owing to the Chapter or the Fulbright Association.

- A business meeting of the Chapter shall be held annually at a time and place determined by the President.
 - Other special meetings of the members may be called by the President or by three members.
 - Notice of all meetings, specifying the business to be conducted, shall be provided to members at least thirty days in advance of the meeting.
 - A quorum shall consist of those members present unless otherwise provided by law.
 - A majority of votes carries any action, except where provided otherwise by law or by these Bylaws.
 - Proxy and mail voting is permitted, unless otherwise provided by law.

Article III – Board of Directors

- There shall be at least three (3) and no more than fifteen (15) members of the Board of Directors elected by the members for two year terms. All directors must be legal residents of the geographical territory served by the Chapter and members in good standing of the Fulbright Association.

- The Board of Directors shall supervise, direct, and control the policies and programs of the Chapter.
- The officers shall provide the day-to-day oversight of the activities and programs of the Chapter.
- Nominations for the Board and for President will be open to the entire Chapter membership and a call will be made for those nominations from Oct. 1 to October 31 of each year. Candidates may self-nominate or be nominated by other Chapter members. Elections are to be held within thirty days of the close of the nomination period. The balloting (Election) period must be open two weeks (Fourteen days). Ballots should be sent out no later than Nov. 10th. The form of ballot, when approved by the Chapter's Board of Directors, shall be transmitted electronically to all members of the Chapter in good standing, unless a member shall request a paper ballot by mail. A ballot shall be valid only if it bears the signature or name of a member of the Chapter in good standing and is received, electronically or by mail, by the Chapter on or before the date specified in the form of ballot, or is presented at the annual meeting.
- The President shall call regular monthly meetings of the Board of Directors, and may call special meetings of the Board of Directors.
 - Notice of a meeting of the Board, specifying the business to be conducted, shall be provided to Directors at least ten days in advance of a regular meeting and two days in advance of a special meeting.
 - A majority of directors shall constitute a quorum.
 - A majority of votes shall carry any action, except where provided otherwise by law or by these Bylaws.
 - Meetings may be held by conference calls
 - Mail voting is permitted. Proxies are not permitted.
 - Any director may resign at any time by giving written notice to the President or the Board of Directors, which resignation shall take effect upon receipt or at the time and date specified therein.
- A Director may be removed for adequate reason by a two-thirds vote of the Board of Directors, with the Director being considered for removal not participating in the vote.

- Unexcused absence at three consecutive meetings of a Board of Directors constitutes abandonment of office and is grounds for removal from the Board of Directors.
- At its discretion, the Board of Directors by a 2/3 vote may fill a Director vacancy on the Board, until the next membership meeting. Each replacement candidate is voted on individually by name. The Board secretary tallies and records in the minutes of the meeting vote to fill all vacancies. No vote that is not recorded shall be considered valid or binding.

Article IV – Officers

- The President of the Chapter shall be elected by its members. The other Officers shall be elected by the Board of Directors.
 - The Officers shall be:
 - President
 - Vice President
 - Secretary
 - Treasurer (or Secretary/Treasurer)
 - Other Officers which the Chapter Board of Directors deems necessary
 - Officers serve a one (1) year term and may be re-elected once.
 - In circumstances of re-electing Officers beyond their two year limit, Chapters should consult the National Office of the Fulbright Association for guidance.
 - The past president serves on the board as ex-officio for a one-year term as a non-voting member.
- The elected Officers shall perform those duties that are usual to their positions and assigned to them by the Board of Directors.
 - The President, as the chief elected Officer of the Chapter, shall preside at meetings of the Board, the Executive Committee, and the membership, and shall be an ex-officio member of all committees.
 - The Vice President shall act in place of the President when the President is not available.

- The Secretary shall be the recording officer, with responsibility for meeting minutes, notices and announcements.
 - The Treasurer shall be the financial officer, with responsibility for oversight of revenues, expenditures, bank accounts, preparing and presenting financial reports of the Chapter to the Board, Executive Committee, membership and National Office.
- All officers except the President may serve up to two terms consecutively in the same position.
 - The president is limited to a 2-year term in office, renewable once.
 - Any Officer may resign at any time by giving written notice to the President or to the Board of Directors. Any such resignation shall take effect upon receipt or at the date and time specified therein.
 - Should a vacancy occur due to the resignation or removal of an officer, the Board of Directors may fill the officer position by a two-thirds vote for the unexpired portion of the term of office. Candidates filling vacancies are selected and voted upon by the Board of Directors.
 - The President may, with the Board’s approval, engage employees or outside consultants as necessary.
 - An elected Officer also serving on the Board may be removed for adequate reason by two-thirds vote of the Board of Directors, with the Officer being considered for removal not participating in the vote.
 - The Chapter Secretary will report/provide all names of the elected Officers and Board of Directors within fifteen (15) days of elections to the National Office.
 - Officers shall begin to serve their terms on January 1 or as soon thereafter as possible.

Article V – Financial and Tax Matters

1. The Chapter confirms and acknowledges that, as a chapter of the Fulbright Association, it is not a separate legal entity but is an integral part and subordinate organization of the Fulbright Association, which is a tax-exempt organization described in Section 501(c)(3) of the Internal Revenue Code, as amended (“Section 501(c)(3)”). As such, the Chapter confirms that it will at all times observe the requirements of Section 501(c)(3), and that it will engage in no activity which might endanger such tax status, and that it will file all tax and other reports required in connection therewith, including, without limitation, 990-N e-postcards or their successor forms.

2. The Chapter acknowledges and confirms that it shall be responsible for its own actions and program activities, that the Fulbright Association is in no way responsible or liable for the actions and omissions of the Chapter or its Directors, Officers or members, and that the Chapter has no authority to act for the Fulbright Association in any matter or for any reason.

3. The Chapter may purchase and maintain insurance on behalf of itself and/or any person who is or was a Director, Officer or other “volunteer” (as and to the extent defined in Section 29-406.90 of the District of Columbia Nonprofit Corporation Law of 2010, as amended) or who was serving at the request of the Chapter as a Director, Officer employee or agent of another legal entity, against any liability asserted against such person and incurred by such person in such capacity, or arising out of his or her status as such.

Article VI - Miscellaneous

- The Board may appoint an Executive Committee, which shall consist of the elected Officers of the Chapter. If so appointed, the Executive Committee shall be responsible for managing the Chapter when the Board is not in session. The President shall appoint individuals to serve on all other standing or ad hoc committees, as approved by the Board of Directors.
- Amendments to these Bylaws may be made at any meeting of the Board of Directors by a two-thirds vote, where notice of the proposed amendments was provided to the members of the Board of Directors at least thirty days in advance of the meeting. The Board of Directors of the Fulbright Association (National Office) must first approve all amendments to the Bylaws of the Chapter.
- Directors, Officers, and other authorized employees or agents of the Chapter may be indemnified by the Chapter against claims for liability arising in connection with their positions on behalf of the Chapter to the full extent permitted by law.
- The Fiscal year of the Chapter shall be the calendar year (January 1st – December 31st).
- Chapters shall hold at least two and preferably four or more events annually.
- In addition to these Chapter Bylaws, the Chapter shall be bound by and shall comply with the terms of (1) the Chapter Affiliation Agreement entered into by the Chapter and (2) the Bylaws of the Fulbright Association to the extent such Bylaws are not inconsistent with the terms of these Chapter Bylaws and (3) the Chapter Handbook.

Revised and updated, February 16, 2017.

4. OBLIGATIONS OF CHAPTER

The Chapter's obligations under this Agreement shall, without limitation, include the following:

4.1 Chapter Status, Activities, and Purposes. The Chapter shall conduct all of its activities under this Agreement in accordance with the highest legal and ethical standards, requirements for tax exempt status under Section 501(c)(3) of the Internal Revenue Code, and the Association's and the Chapter's Bylaws. Furthermore, the Chapter shall conduct its activities in accordance with policies and procedures set forth in the Association's Chapter Handbook. Any amendments to the Chapter's Bylaws or other governing documents to be proposed shall first be submitted to the Board of Directors of the Association for its approval. The Chapter shall apply for and maintain its own Tax Identification Number and timely file its Form 990-N postcard with the Internal Revenue Service.

4.2 Recordkeeping. The Chapter shall maintain its own financial and tax records and shall forward copies of such records to Association, upon request. Further, Chapter shall maintain records related to its participants in educational and cultural programs, its mailing lists, mailings of publications, and other activities and operations. The Chapter shall submit to the Association on an annual basis reports with respect to the above, including budget and financial statements, and describing any other activities which the Chapter has undertaken pursuant to this Agreement during each such twelve month period.

4.3 Programs. The Chapter shall endeavor to sponsor at least [two(2)] annual educational and cultural programs which further and serve the purposes of the Association , and shall use its best efforts to ensure that such programs are of the highest quality with respect to program content, materials, and logistical preparation. The Chapter shall seek approval from the Association before entering into sponsorship or co-sponsorship of programs and other events. The Chapter shall send on a regular basis to the Association a schedule of upcoming meetings, minutes, conferences, seminars, and other program events. The Chapter shall seek approval from the Association in advance of issuing press releases and newsletters and other public materials describing Chapter activities. The Association may, at its sole discretion, send representatives to observe such Chapter functions at no program cost to the Chapter.

4.5 Member Charges. The Chapter shall not charge dues to its members, but may charge reasonable program fees and/or annual activity fees to cover the costs of programs and related overhead expenses. Each member of the Chapter must join the Association at the membership level then set forth for membership in the Association, and the Association may , in is discretion, allocate a portion of a new member's initial membership fee for joining the Association to the Chapter. [A portion of the funds raised by the Chapter for programs, cultural events and other events will be paid by the Chapter to the Association in an agreed amount as an administrative fee.]

4.6 Fund Raising. In order to promote their common purposes and to reduce conflict and duplication, the Chapter agrees to coordinate all of its fundraising proposals with the Association, including direct mail appeals, proposals for grants from public and private entities, requests to individuals for cash or in-kind donations with the Association, and to submit any proposals for the solicitation of funds to the Association prior to undertaking such ventures. [A portion of funds so raised by the Chapter will be paid to the Association in an agreed amount as an administrative fee.]

5. USE OF TRADEMARK AND COPYRIGHTED MATERIALS: CONFIDENTIAL INFORMATION

5.1 The Chapter Stationery and Logos. In order to promote their common purposes and to reduce the use of conflicting or confusing names, the Chapter agrees to use exclusively standard logos and stationery as approved by the Association.

5.2 Limited License. The Association grants the Chapters limited license to use the logos, trademarks, service marks, trade names, membership and donor lists, data or copyrighted materials of the Association with the Association's prior written consent in connection with performance of the activities authorized under this Agreement. Any use of the Association's logo, mark, or name shall be the logo, mark, or name approved by the Association. With respect to any use of the Association's logo, mark, name, membership or donor lists, data or copyrighted materials, the Chapter shall ensure that the applicable trademark or copyright notice is made as requested by the Association. In any event, upon expiration or termination of this Agreement, all use by the Chapter of the Association's proprietary property, such as logos, marks, names, or copyrights, shall end immediately.

5.3 Confidential Information. The Chapter shall, during the term of this Agreement and thereafter maintain the confidentiality of any or all of the Association's confidential or proprietary information or data (collectively, "Confidential Information"). Upon termination of this Agreement for any reason, the Chapter shall immediately deliver to the Association all written documentation, including copies, of or concerning such Confidential Information, and shall make no further use thereof.

6. TREATED AS SEPARATE ENTITIES: INDEMNIFICATION

6.1 Separate entities. The Association and The Chapter expressly acknowledge and agree that they are, and shall remain, treated as between the Association and the Chapter as separate entities and that no partnership or agency is created by virtue of this Agreement. As such, neither party shall be authorized to incur any liability, obligation, or expense on behalf of the other, and each of the Association and the Chapter shall be responsible and liable for its own acts (including, without limitation, the entering into and performing contracts in the name of the Chapter), errors and omissions and negligence.

6.2 Indemnification. In furtherance of the above intention and agreement, the Chapter hereby agrees to indemnify and hold harmless the Association, its officers, directors, agents, members, and employees, from and against any action, proceeding, claim, damage, cost, or expense which may arise by reason of any act or omission by the Chapter, or any of its officers, directors, members, or employees.

7. REVOCATION OR SURRENDER OF CHARTER

7.1 Revocation of Charter. The charter granted to the Chapter, with all of its attendant rights and obligations shall remain in full force and effect, unless revoked by the Association or surrendered by the Chapter in accordance with the following provisions. The Association, through its Board of Directors, shall have authority to revoke the Chapter's charter if the Board of Directors of the Association determines in its discretion that the conduct of Chapter is in violation of this Agreement or the provisions of the Association's or the Chapter's Bylaws, or the Association's Chapter Handbook concerning Chapter organizations. Any decision by the Association to revoke the Chapter's charter shall be initiated by the sending of written notice to the Chapter specifying the grounds upon which such revocation would be based; provided, however, that the Association shall give the Chapter 60 days from such notice to cure any alleged breach of the Agreement or violation of the Bylaws of the Association or

the Chapter or provisions of the Chapter Handbook. The decision of the Association's Board of Directors shall be final and appeal may not be taken to any other forum.

7.2 Surrender of Charter. The Chapter may surrender its charter by delivering to the Association notice of its intention to do so at least 60 days in advance of the effective date of such action.

7.3 The Association's and the Chapter's Rights after Surrender or Revocation of Charter. After any such surrender or revocation of the Chapter's charter, the Association shall have the right to notify each member of the Chapter in the Territory of the facts of such surrender or revocation and shall have sole authority to organize a new chapter of such members to replace the former Chapter. In no event shall the Chapter continue to represent its members or any other members of the Association, or compete in any other way in the relevant industry or profession, for at least one (1) year after the suspension or revocation becomes effective. The limited license granted hereunder by the Association to the Chapter shall cease and be void and of no further legal effect upon the effective date of such suspension or revocation of the Charter, the Chapter shall be dissolved and, except to the extent required by law, all assets of the Chapter shall be transferred to and become the property of the Association.

8. MISCELLANEOUS

This Agreement constitutes the entire Agreement between Association and Chapter and may be amended only by a writing executed by both parties. This Agreement shall be governed by and construed in accordance with the laws of the District of Columbia, and each of the Association and the Chapter waive any objection to jurisdiction or venue in the District of Columbia. . Any waiver by either party to this Agreement of any provision shall not be construed as a waiver of any other provision of this Agreement. If any provision of this Agreement is determined to be invalid or unenforceable in whole or in part, the remaining provisions shall remain enforceable. This Agreement shall inure to the benefit of Association, its successors and assigns.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized representatives, effective as of the date first written above.

CHAPTER

ASSOCIATION

By_____

By_____

Name_____

Name_____

Title_____

Title_____

Date_____

Date_____

Appendix G: Alumni Engagement Programs

The recently-developed programs below offer excellent opportunities to engage alumni. Every chapter is encouraged to consider participating in one or more of these programs.

Young Professionals Network of the Fulbright Association (YPN)

In 2010, a group of young Fulbright alumni formed a pilot initiative called “Fulbright Association Young Professionals.” Their goal was to plan career development- and mentorship-focused events for the younger Fulbright alumni in Washington, DC.

- Eight events were planned by the YPN Committee in 6 months
- Over 100 alumni attended events
- National Capital Area Chapter officially recognized the YPN as a sub-committee of the chapter
- Four of the eight newly elected 2012 NCAC board members were involved in and/or found out about the Fulbright Association through the YPN.

Proposed Structure

Each chapter has the opportunity to create a Young Professional Network as part of the broader network within the Fulbright Association that would engage and support younger Fulbright alumni in career development and mentorship. The mission would be to engage and inspire all generations of Fulbright alumni to support the next generation of Fulbright leaders.

Even though a network of chapters exists throughout the country, the chapters cater to a broad demographic of Fulbright alumni, making it difficult for chapters to focus on career development for its younger members. A coordinated Young Professionals Network would help alumni chapters demonstrate more value to younger alumni and enhance career development and mentorship opportunities for them.

The aim is to:

- Convince young Fulbright alumni to join the Fulbright Association
- Demonstrate value to the younger generation of alumni while growing membership in all age groups
- Making the Association fun, relevant, useful and exciting for younger alumni
- Doing it in a simple and sustainable model that fits within the current infrastructure.

Expansion of Activities and Geography

The program is ready to be launched under different chapters nationally:

- Continue to build on the success of the National Capital Area Chapter experience and test out more ideas in Washington, DC
- Grow nationally to include other chapter regions
- Establish an online presence

- Integrate activities into the Fulbright Association website.

Proposed Activities

Social Activities

Informal happy hours and dinners can be set up to create comfortable environments for Fulbright alumni to interact socially and for networking purposes. Most of these activities would not cost the organization any money since they would be pay-as-you-go events.

Mentorship and Networking Events

YPN could connect volunteer alumni who are interested in mentoring younger Fulbrighters in specific fields. YPN could independently or in partnership with an alumni chapter, plan networking events that invite experts (business and professional leaders, professors, etc.) to speak to Fulbright alumni about a specific topic. Many alumni chapters already plan similar events, so YPN could support or take the lead on planning these events for all alumni.

YPN Database

YPN would use the Fulbright Association's new website capabilities to add career-specific information to the Fulbright Association's database. This can then be used to connect mentors to mentees, identify job opportunities, and enhance the Association's ability to foster career development for its younger members.

Jobs and Internships

YPN would work with Fulbright alumni to: (1) gather a list of job opportunities for companies/organizations that Fulbright alumni have close relationships with; (2) create exclusive job listings that Fulbright Association members would have special access to (this could be an early window of time where Fulbright alumni might be able to submit applications); and (3) create exclusive internship opportunities for Fulbright alumni.

Contact the National Office on how to start a YPN initiative under current chapter activities.

Diversity Initiative

The Department of State sees diversity as integral to the Fulbright Program's remaining the "flagship of international educational and cultural exchange." Those of us who have held grants are needed to assist by attracting more persons of color to consider the opportunity of becoming grantees.

By sharing experiences with those who are in our circle of influence, whether in teaching, research, or in our local communities, through involvement as members of the Fulbright Association, we expand the "mutual understanding" that Senator Fulbright espoused when the program was launched six decades ago.

Currently, the Association is working with the State Department on an Enhancement Grant to build capacity in our 50 chapters and increase overall membership with special emphasis on a Diversity Initiative. The National Office asks that you encourage colleagues and graduating students who are people of color or who are attending Minority Serving Institutions of Higher

Education (MSIS) to consider applying for a Fulbright, and, if they have questions about the application process, share your good counsel.

TEDxFulbright

Our National Office provides guidance for chapters seeking to host TEDxFulbright events. Seldom do two independent concepts connect as well as Fulbright and TEDx. The Fulbright Program nurtures mutual understanding and respect across cultures by the exchange of compassionate, socially aware individuals serving as ambassadors across all fields of professional engagement. TEDx, similarly, has shown immense promise in furthering ideas for the benefit of all societies in a way that is both personable (revolutionary story-telling) and powerful (demonstrating incredible feats of intellect, creativity, and collaboration). It is our continuing wish to provide Fulbright chapters with a TEDx framework to most effectively excite and gather others to join efforts in working for the sake of humanity's progress. TEDxFulbright is operated under license from TED.

Fulbright in the Classroom

In 2017 we will pilot a program called "Fulbright in the Classroom," training a representative(s) in each chapter to provide K-12 programs in international education in local schools and create familiarity with the Fulbright Program. This program is administered by the National Office.

Pathways to Peace

This program encourages chapters to develop international service projects in any of five areas:

- international education
- sustainability
- global health
- peace building
- economic development.

Chapters create a project for a particular country, identify an NGO partner in that country who can manage project planning and logistics for a one- or two-week period, and work with the National Office to finalize the MOU and register alumni as participants. The Georgia Chapter piloted the concept in 2017, with a sustainability project in Malawi.