



The English-Speaking Union
English in Action

Board-Managed Branch Operations Manual

May 1, 2018 rev.

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PURPOSE OF THIS MANUAL

This manual was compiled primarily for newly elected Branch officers and directors when they take office. The ESU Board of Directors appreciates their willingness to lend their time and talent to the ESU mission and work, but also realizes that they must be fully aware of the commitment that they are undertaking and understand the breadth of their duties. In addition, Branch officers need to understand some implicit requirements to be a Branch of The English-Speaking Union of the United States.

THE ESUUS/BRANCH RELATIONSHIP

The ESUUS/Branch relationship is symbiotic: the National Organization supports the Branches, and the Branches support the charitable mission and programs of the ESU locally.

How the ESU Supports the Branches

ESU staff provides the Branches with the framework, materials, and website presence to promote and conduct national programs locally in furtherance of the mission to serve thousands of teachers, students, and recent immigrants across the country. These include but are not limited to The English-Speaking Union National Shakespeare Competition, English in Action, Teachers Learning Abroad (TLab) Scholarships, other TLab educational travel opportunities, Andrew Romay New Immigrant Center (ARNIC), Secondary School Exchange, Middle School Debate, and Luard Morse Scholarships. Headquarters also organizes the Annual Conference and assists with regional meetings.

The Development Department is available to support your Branch by providing funding templates and tailoring proposals to local prospective funders for all ESU partner programs administered by Headquarters. The National Patron Program is a structure for individual giving to your Branch and the National organization; it is vital to branch and national programming and provides ESU members with the means to become a stakeholder in local, national, and international ESU endeavors. The National Patron Program, administered by Headquarters, provides Branches with funds for general support while offering Patrons membership in the ESU with certain benefits, including exclusive National Patron events, advance notice of educational travel opportunities, and national recognition, not available to the general membership.

The Branch Services Department supports Branches' membership and publicity efforts providing membership renewal mailings for all members, an on-line membership roster of all members by Branch, free customized membership brochure templates; mailing lists; press releases; free Branch website and support. It also maintains the Mimi Wilson Source List of Speakers of available, affordable speakers and assists with their booking.

Headquarters conducts the annual membership renewal billing, undertaking the entire process and underwriting the printing and mailing costs. Headquarters also provides the Branches with liability insurance with greatly discounted rates under its umbrella policy and files a 990 return with the IRS that includes the Branches.

How the Branches Support ESU

The Branches are the local delivery system of the ESU, furthering its mission in their communities through ESU programs. The committed volunteers dedicated to the educational and fellowship functions of the Branch are invaluable in bringing the mission of the ESU to fruition. The Branches are the main engine for generating membership. By creating and hosting interesting member programs, Branches attract and retain members whose involvement, dues, and contributions benefit the ESU on both the Branch and the national levels.

Membership Dues

While the national portion of members' dues is integral to the national ESU operating budget, in fact, dues only provide approximately 7% of the total operating expenses of the ESU and less than 50% of the cost of Branch support programs annually. The other funding needed for Headquarters to support the Branches in their programs must be raised from sources other than members' dues.

BASIC BRANCH REQUIREMENTS

The English-Speaking Union of the United States is a non-profit, non-political, tax-exempt, educational organization recognized by the Internal Revenue Service under Sections 501(c)(3) and 509(a) of the Tax Code of 1986. Because the LLC Branches are integral to the organization, they are not required to submit filings to the IRS. However, their financial activities must be covered in a Federal Tax Return (Form 990) tax return filed by Headquarters. This imposes a requirement on all Branches to conduct their business in a way that does not jeopardize this status and is in conformity with Delaware Law. This requirement, along with others in the LLC Branch Board-Managed Operating Agreement (BMOA) and those in the bylaws of The English-Speaking Union of the United States, are summarized below:

The Branch shall fulfill the following responsibilities in order to establish and maintain a relationship with ESU:

1. To operate within the terms of, and conduct educational programs compatible with, the mission statement of the ESU;
2. To establish a minimum of 25 Members;
3. To operate in compliance with the Branch Operations Manual as established by ESU;
4. To operate in compliance with the ESU Billing Policies;
5. To operate in compliance with the ESU Membership Policies;
6. To submit an annual budget for the Branch to ESU prior to September 30 of each year;
7. To submit to ESU minutes of the Annual Meeting within 30 days of such meeting;

8. To maintain an official Branch address (a post office box will suffice) and contact information (include telephone numbers and email addresses) and to provide Headquarters with any updates or changes to this Branch address and contact information, including the most current electronic mail addresses of the Branch's President, Secretary, and Treasurer.
9. To carry appropriate insurance and remit the Branch's proportionate share of the premiums for liability and D & O insurance carried by Headquarters to ESU annually in accordance with the Branch Operations Manual;
10. To submit to ESU, within the timeline ESU identifies, the information necessary for ESU to include the Branch's financial data in the tax return filed with the Internal Revenue Service (Form 990, 990-EZ or 990-N), any related federal or state registrations or tax returns, and the annual audit;
11. If the Branch hires employees, to comply with all applicable labor, employment, and tax laws relating to such employees;
12. To grant ESU access, on reasonable written notice, to all bank and investment statements received by the Branch for all bank and investment accounts maintained by the Branch;
13. Within two years of becoming a Board-Managed Branch, to participate annually in a minimum of two educational programs run by ESU or approved by ESU as fulfilling its mission;
14. To maintain and comply with a Conflict of Interest Policy in the form supplied by ESU;
15. To, at all times, conduct and carry on only those activities that are permitted to be conducted or carried on by an organization that is exempt from tax under Section 501(a) of the Code and described in Section 501(c)(3) of the Code and that shall not adversely affect the tax-exempt status of ESU under Section 501(a) of the Code and described in Section 501(c)(3) of the Code, including, without limitation that:
 - a. no part of the Branch's net earnings shall inure to the benefit of, or be distributable to, any contributor, director, officer of the Branch or ESU or any other individual, person or organization, except that the Branch shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth herein;
 - b. no substantial part of the activities of the Branch shall consist of carrying on propaganda or otherwise attempting to influence legislation; and
 - c. the Branch shall not participate or intervene in any political campaign on behalf of (or in opposition to) any candidate for public office; and
16. To notify ESU promptly of any threatened or actual claim or action against the Branch. In addition, Branches must operate within the terms of the Mission Statement below:

The English-Speaking Union of the United States celebrates English as a shared language to foster global understanding and good will by providing educational and cultural opportunities for students, educators, and members.

Branches should also use the ESU's Tagline:

- *English in Action*

And its Vision Statement:

The ESU, a non-profit, non-political organization,

- *advances global understanding by providing educational opportunities through programs and scholarship for students, educators, and members;*
- *promotes communication and open exchange of ideas among the world's speakers of English;*
- *enriches communities through active involvement of its branch members in outreach programs;*
- *offers financial assistance to students and educators to further academic pursuits in English-related studies, and*
- *develops common bonds through a shared interest in the English language and culture to strengthen friendship among members and those they serve.*

BRANCH ORGANIZATION

The LLC Branch Board-Managed Operating Agreement requires that the business and affairs of the Branch shall be managed by a Board of Directors. To serve as a Director, an individual must be a dues-paying member of both the Branch and the ESU. The Directors shall be elected by the Members at an Annual Meeting of the membership of the Branch.

Elections to the Board are for three year terms, except in filling vacancies where the Director-elect shall enter the class of his or her predecessor. No Director who has served two full consecutive terms may be re-elected as a Director until one year after the expiration of his or her second full term. No individual may serve as a Director for more than six successive years, regardless of whether the proposed election of such individual is as a Director or as an Officer.

The Board has the power to elect an Executive Committee, which must include the President, Secretary, and Treasurer and may include other Directors. The Board shall empower and provide for the functions, procedure, and tenure of such Executive Committee. The Board may also elect a Nominating Committee, a Finance and/or Audit Committee, a Membership Committee, and other committees.

The Officers shall be elected by the Members at the Annual Meeting and shall serve for one year or until their successors are elected. No Officer shall serve as the same Officer for more than three successive years and may not be elected to a new term until one year after the expiration of his or her term limit.

Each Officer shall also serve, ex officio, as a Director. The Branch shall have a President and/or Chairman, a Treasurer, and a Secretary, and may have one or more Vice Presidents, Vice Chairmen, or other positions with such titles as the Board deems desirable and consistent with applicable law, who are elected at the Annual Meeting.

The President and Secretary may be the same person. The Treasurer may not be the same person as either the President or the Secretary. The Vice Presidents or Vice Chairmen, if any, may include, without

limitation a Nominating Committee Chairman, a Finance and/or Audit Committee Chairman, a Membership Committee Chairman, a Program Chairman, an Education Chairman, and such other positions as the Board deems desirable.

The Board has the power to fill Director, Officer, or Committee vacancies until the next Annual Meeting.

Each Branch should designate individuals responsible for specified activities. At a minimum, these should cover Education, Membership, and Programs. These people may be Vice Presidents, and they should be supported by committees. Strong committees breed successive generations of leaders. While, in general, committee members need not be board members, it is desirable for committee chairs to be board members and for all board members to serve on at least one committee.

Branches with paid staff may delegate responsibilities differently but the principles should remain the same. Executive secretaries can be important managers, but the Officers and the Board must set the policies and make the decisions.

LEADERSHIP

It is impossible to overemphasize the importance of strong, engaged leadership for a successful Branch. No doubt, by nature of our organization, all Branches have members who have held positions of leadership in their careers. Those who are still working are often reluctant to take on additional roles, and those who are retired often want to do just that and not take on demanding duties. Fortunately, there are exceptions, and many Branches have succeeded in finding excellent leaders.

Branches should develop a progression through the various roles leading to Branch President. When good leaders are identified, they should be encouraged to serve in leadership positions that best suit their qualifications and talents. Board members should also be selected because of their capabilities and all should be given some role in the organization. There may be some exceptions for members who have provided extraordinary services in the past but these should be few.

Unfortunately, leadership positions are sometimes filled by people who want the job without the serious intention of fulfilling the responsibilities or by whoever is willing to be pressed into service. Such appointments are not conducive to a thriving Branch.

Leadership Succession

An established plan for leadership succession is a vital component of any successful organization. Incoming Branch Directors and Officers must fully understand their responsibilities in order to ensure a smooth transition from one “administration” to the next. This might be as simple as electing a Vice-President who works closely with the President and is understood to be the next in line for the presidency. The Branch President mentors his or her successor by teaching him or her the ropes; educating him or her about local and

national initiatives; and providing guidance, support and encouragement. In such cases, new Presidents come into office already familiar with Branch operations and are free to concentrate on more important governance issues.

Branch Boards can provide for continuity of leadership by establishing a set of responsibilities for key positions, such as the Treasurer and Chairmen of the Education, Membership, Finance, and Program Committees; evaluating potential candidates for those roles; monitoring candidates' developmental progress; ensuring that they are supported by a strong and active committee structure; identifying successor candidates for each position; and assigning mentors to potential candidates to groom them for future service.

THE ROLES OF OFFICERS AND COMMITTEE CHAIRMEN

The President

The President is responsible for the overall management of the Branch according to its LLC Operating Agreement, for providing strong leadership, and for ensuring that the goals of the Branch and the English-Speaking Union are met. The specific duties of the President are as follows:

- To be the primary conduit of information between the Branch and Headquarters;
- To preside at meetings of the Board, the Executive Committee, and Branch meetings;
- To appoint the chairs of committees;
- To appoint a Nominating Committee for Officers and Directors;
- To consult with the Nominating Committee regarding succession of officers;
- To ensure that the Branch website, linked to the ESUUS national site, is kept current;
- To ensure that information and publications received from the National Headquarters and the Region are appropriately distributed within the Branch;
- To ensure that the Branch e-mail account is monitored and addressed;
- To attend National meetings and encourage other members of the Branch to do so. If the President is unable to attend, a Vice President should;
- To ensure that reports, particularly the annual budget, 990 financial and governance information, and board meeting minutes, are accurate and are submitted to Headquarters when specified;
- To set an example by joining the National Patron Program at one of its levels.

The Treasurer

Responsibilities:

- To maintain financial records according to accepted accounting principles;
- To maintain appropriate records for educational funds;
- To open bank accounts and arrange the necessary signing authorities;
- To deposit checks and make payments;

- To make recommendations to the Board regarding the prudent investment of Branch funds;
- To handle the payment and reporting requirements for any paid employees or consultants;
- To submit financial records to the Branch Finance Committee for review annually;
- To make a financial report at Branch board meetings;
- To prepare a Branch Budget for submission to the Branch Board and Headquarters;
- To ensure that all charitable donations and gifts, including membership dues that are received directly by the Branch and deposited into Branch accounts are appropriately acknowledged in compliance with IRS regulations; alternately, that any of these are forwarded to Headquarters for processing and acknowledging, with the understanding the appropriate amounts will be returned within six weeks (at the most) to the Branch.
 - To ensure that all reports due to funders are submitted in a timely fashion.
 - To cooperate with auditors should an audit be required.
 - To submit a Branch Annual Report (known as the “990 Questionnaire”) to Headquarters by the stated deadline;
 - To remit payment of the Branch share of insurance coverage under the ESU umbrella policy;
 - To set an example by joining the National Patron Program at one of its levels.

The Secretary

Some Branches may choose to divide the secretarial responsibilities among more than one individual by appointing a Corresponding Secretary, a Recording Secretary, or a Membership Secretary.

The Secretary (or Secretaries) has the following responsibilities:

- To keep minutes of meetings and ensure that a minute book is maintained as a formal record of Branch business;
- To distribute materials received from Headquarters and elsewhere to Board members and members as appropriate;
- To prepare an agenda for Board and Executive Committee meetings in consultation with the President;
- To monitor the on-line roster of members, reporting changes and corrections to Headquarters (*Note: This responsibility is often performed by the Treasurer or Membership Secretary.*);
- To ensure that email and mail is processed in a timely way when officers are out of town for significant periods. A Post Office Box is recommended;
- To notify Headquarters of changes in officers and directors;
- To set an example by joining the National Patron Program at one of its levels.

The Program Chairman

Creative, engaging programs are the key to retaining current members and recruiting new ones. The programs are such an important component of Branch life that quite often the Program Chairman is the Branch's first Vice President with the understanding that he or she will become President.

Branch programs cover a wide range of activities and, over time, they have usually been developed to satisfy the tastes of the members. However, in order to attract different groups of potential members, we encourage Branches to experiment with a variety of topics and formats, such as less formal and less costly events, different days and times, meetings aimed at younger, working people, etc. Branches should also consider networking with other local organizations, perhaps co-sponsoring events.

The Branch Program Chairman/Committee has the following responsibilities:

- To correspond with speakers and presenters, as required;
- To arrange for meeting places and the necessary audio/visual equipment – slide or PowerPoint projectors, TV/VCR, etc;
- To ensure that arrangements are made to provide hospitality and transportation for speakers;
- To ensure that thank you letters are written to speakers.

Please keep in mind that Branch programs need not be limited to speaker events. Branches also include field trips to museums, theaters, or other sites of interest in their program calendars. Many Branches celebrate the Queen's Birthday in June with a special tea or garden party. Branches also sponsor on-going special interest events such as play reading groups, book discussion groups, film appreciation groups, and poetry groups.

The Finance Committee Chairman

The Chairman of the Finance Committee should be a board member other than the President and the Treasurer. This committee should review the Branch's finances including its statements from financial institutions, review its 990 report prior to submission to the National Headquarters and should be the entity to which the Branch Board's conflict of interest disclosure statements are sent. The committee may also operate as an investment committee charged with overseeing the Branch's investments.

The Finance & Governance Chairman

Introduced in 2011 by direction of the National Board, this Committee provides for an independent audit of the IRS 990 forms prepared by the Treasurer ("990 Questionnaire") and confirms receipt by the Secretary of the Board of Conflict of Interest Statements for all members of the Board.

The Membership Chairman

The Membership Chairman and Committee are responsible for all aspects of membership. It is widely accepted that the best way for attracting members is through contact by the general membership. However, a strong Membership Committee is essential to provide structure, direction, and ongoing attention to retention and recruitment efforts. Such a committee is likely to be far more effective in building membership steadily, regularly adding a few members who can be tracked on a personal basis. A large-scale membership drive may bring in many new faces at once and initially swell the membership rolls. But it only works when those who join in such a fashion get to know other members, become properly involved in the activities of the Branch and feel themselves a real part of it. The Membership Committee needs to develop strategies to see that this happens. Otherwise, new members may soon drop out after the first year.

Specifically, the Membership Chair and Committee are responsible for:

- Developing broad plans for recruiting new members and setting membership goals;
- Designing and producing suitable membership brochures and application forms;
- Sending welcome letters to all new members;
- Arranging to greet new members at meetings and introducing them to current members;
- Following up on delinquent members to find out why they have not renewed their memberships and resolving any problems that may have arisen;
- Arranging with local libraries, schools and Chambers of Commerce to display ESU membership material;
- Monitoring the on-line roster of members, reporting changes and corrections to Headquarters. *Note: this function may also be performed by a Membership Chair, the Treasurer or the Branch Secretary; but whoever is responsible for doing so, should also be a member of the Membership Committee.*

The Education Chairman

All Branches are required to participate in at least two of the ESU's national educational programs. Headquarters arranges a wide range of educational initiatives. They include:

- The English-Speaking Union National Shakespeare Competition
- English in Action
- Teachers Study Abroad – UK (Formerly BUSS)
- Middle School Debate

Branches are not limited to these programs. They may wish to initiate their own projects in consultation and cooperation with local educational institutions provided they are compatible with the mission of The English-Speaking Union and are approved by the national board.

Besides satisfying the primary objectives of the organization, educational programs will also benefit the Branch. Arranging these programs provides contact with local educational institutions and access to potential sources of new members. Scholarships and award recipients often become Branch members and leaders.

Specific responsibilities of the Education Chairmen and the Committee are:

- To develop plans for the Branch Education Program for approval by the Board;
- Develop and distribute material about the Program to appropriate institutions and to solicit applications for scholarships and awards;
- Interview candidates for scholarships and awards and make recommendations to the Board;
- Arrange for recipients of scholarships and awards to meet members and make presentations at meetings;
- To organize the Branch Shakespeare Competition in consultation with the local school system.

The Nominating Committee Chairman

After the annual elections, the President should appoint a Nominating Committee to create a slate of Officers and Directors for the following year. The Committee should include members with a broad knowledge of the membership and particularly the newer members.

In selecting candidates for office, the Committee should pay particular attention to finding members with potential leadership experience. They should be given responsibilities soon after they join to stimulate their interest and get them involved. Continuity should be maintained on the Board by not changing too many officers and directors in any one year. On the other hand, term limits for officers and directors should be observed.

OTHER BRANCH RESPONSIBILITIES

There are other important functions that are not included above, and individuals should be appointed to perform them, when appropriate.

Development

Branches should appoint an individual to be responsible for fundraising to support the Education Program. In smaller Branches, this function may be performed by the entire Board but in any case, a member should be designated to help develop support through National Patron membership with support from Headquarters' Development Officer. Fundraising initiatives can take the form of solicitations to foundations, corporations (including local businesses) as well individuals; special events, and support of the National Patron Program where the donor gifts may be shared with the Branch.

Specific responsibilities are:

- To develop and implement, with Board approval, a plan for raising funds from the membership and from local foundations and corporations;
- To work with the Program Chairman to arrange fundraising events;
- To solicit local businesses for financial or in-kind support for educational programs.

When a Branch receives any contributions or donations, including membership dues, as well as gifts of securities that are deposited directly into Branch accounts, the Branch (and not Headquarters) is responsible for acknowledging the gift, as it is a contribution received by the Branch not Headquarters. The Branch must do this; Headquarters cannot.

The Branch must send an appropriate “tax letter” that includes date of receipt of the gift, reiterates the kind of the gift (any restriction), mentions the method for transmittal (check, credit card, cash, PayPal, etc.), and confirms and certifies the tax deductibility (as a charitable deduction for federal income tax purposes) of the contribution and certifies that there has been no exchange of goods and services in return for the contribution. See “tax letter” template on page 12. The items highlighted in red should be replaced with appropriate information. If the gift in question is for a fundraising event during which there is a dinner or reception (the cost of the meal or benefit is not deductible, and the Branch must send a letter indicating what is and what is not deductible. See “event letter” template on page 13. The items highlighted in red should be replaced with appropriate information.

In the case of securities, the amount of the gift to be recognized is the fair market value on the date the securities are received by the brokerage firm (the brokerage firm handling the receipt should provide this information). If the securities are received into Headquarters’ brokerage account, headquarters must acknowledge the gift with the appropriate tax letter. Headquarters **cannot** acknowledge receipt of gifts that it has not received and that have not been deposited into its accounts.

However, if a Branch receives contributions (checks) that it forwards to Headquarters for deposit, it should **not** send a tax letter. Headquarters is responsible for sending that letter, as it is the recipient of the gift and that contribution will now show up on its books. Headquarters will arrange for any necessary reimbursement to the Branch.

Examples:

- A member sends a membership check to the Branch, and the Branch deposits it. The Branch must send out the acknowledgment letter for the full amount of the gift (even for the portion that is to be forwarded to Headquarters) and should include membership cards. Having not received these funds directly from the member, Headquarters cannot send a letter confirming receipt of the funds or the amount received or confirm that the gift was received without an exchange of goods or services as it did not receive them. The Branch must also send the headquarters portion of membership dues (\$35 for individuals and \$50 for couples) to headquarters, and headquarters will send the Branch an acknowledgement of receipt but no tax letter. The Branch must arrange for the issuance of membership cards.
- A family foundation sends a grant of \$2,000 by check directly to the Branch, and the Branch deposits the check into its checking account. The Branch must send a “tax letter” to the foundation confirming receipt and certifying that there was no exchange of goods or services in return for the gift. It must also take note of any restriction or requirements (such as the need to send a report on the use of the money) Headquarters cannot do so, as it is not the recipient of the gift.

- An individual sends the Branch a check for \$100 for a benefit dinner event, and the Branch deposits the check. The actual cost of the dinner is \$60. The Branch must send a tax letter informing the donor that the check has been received and that, because there is an exchange of goods and services equal to \$60, only \$40 is deductible as a charitable donation for federal income tax purposes.



The English-Speaking Union
Name Branch

Acknowledgement letter for membership and gifts

When gift is sent to a Branch and deposited in Branch accounts

Date

Name

Address

City State

Dear

On behalf of English-Speaking Union Name Branch, I am pleased to acknowledge receipt of, and to thank you for, your (membership dues, recent gift) of \$amount . We received your check number, dated, in that amount on date. (If a credit card: As you instructed, we charged that amount (or mention the actual amount) to your American Express/Visa/MasterCard account on (provide date)). (If PayPal: We received this gift via PayPal on (provide the date)). These funds provide unrestricted support for the work of the English-Speaking Union Branch (or provide restricted support for the Branch's (education fund, Shakespeare Fund, scholarship fund, whatever). In accordance with IRS regulations, I confirm that there was no exchange of goods or services in return for this gift (donation, distribution, grant, whatever you call it). It is fully tax deductible to the extent of the law.

(You can add whatever else you desire here: more thanks and gratitude, explanation about how this gift advances the Branch or info about upcoming events or activities, etc.)

Thank you again for your support of the English-Speaking Union Name Branch.

Best Regards,

Name

Title of Branch Person

THE ENGLISH-SPEAKING UNION NAME BRANCH LLC

Address

###-###-#### Name of Banch@esuus.org www.esuus.org

Sample Event Letter



The English-Speaking Union
Name Branch

Acknowledgement letter for tickets to events
When gift is sent to a Branch and deposited in Branch accounts

Date

Name
Address
City State

Dear

On behalf of the English-Speaking Union Name Branch, I am pleased to acknowledge receipt of, and to thank you for, your check of \$amount. We received your check number, dated, in that amount on date. (if a credit card: As you instructed, we charged that amount (or mention the actual amount) to your American Express/Visa/MasterCard account on (provide date). (If PayPal: We received this gift via PayPal on (provide the date). These funds cover the cost of one (however many) ticket(s) to Branch's annual whatever event (dinner, dance, tea, etc). Because there is an exchange of goods and services valued at \$55, that amount of your payment is not tax deductible. However, as there is no exchange of goods and services for the balance of \$45, that amount is fully tax deductible to the extent of the law.

(You can add whatever else you desire here: more thanks and gratitude, explanation about how important the event is. Thank the donor/buyer for supporting the event, etc.)

Thank you again for your support of the English-Speaking Union Name Branch.

Best Regards,

Name
Title of Branch Person

National Patrons

The National Patron Program is an important source of funds for both the National Headquarters and the Branch. This program is administered by Headquarters but the Branch should appoint someone to collaborate with the Development Office to promote the program and approach potential National Patrons within the Branch. Details of the Program may be obtained from Headquarters.

Publications

Newsletter – Branches should have a newsletter that announces upcoming programs, reports on past projects and brings the general membership up to date with the news from the National and International ESU and with the work of the various local Branch committees, especially the Education Committee.

Website – Perhaps the strongest tool for increasing membership and engaging community involvement, headquarters provides each Branch with a website linked to the new national ESU site, www.esuus.org. Through the site, Branches can present their local programs and news stories, and people can now join or renew their membership in the Branch online. Updating the Branch website is facilitated through a simple-to-use electronic form or contacting the Branch Communications Officer at Headquarters. While it is the President's responsibility to see that the site is current and appealing, another officer or Board member may be appointed to update its information. For more information call the HQ Branch Communications.

All publications should adhere to the Style Guide that is included as an addendum.

Public Relations

An individual at the Board or officer level should be appointed to deal with publicity for Branch meetings and educational projects. This person may also be responsible for updating the Branch website. Specific responsibilities include:

- To publicize the Shakespeare Competition, scholarships and awards in the local media;
- To publicize meetings in the local media;
- To invite news media representatives to meetings when appropriate;
- To generate feature stories on the ESU in local press;
- To send material to Headquarters for inclusion in the website.

CONCLUSION

It is impossible and undesirable to write procedures to cover all the operational matters of all Branches. Apart from the basic national requirements listed above, this manual is intended to provide guidelines and to help officers and directors understand what their responsibilities are. Each Officer, Director, or member with specific responsibilities should be provided with a job description when taking office.

English Speaking Union: Insurance Memo for Branches

ESU is responsible for maintaining D & O Insurance and General Liability Insurance for ESU and the Branch (the “Insurance”), which will be offered to the Branch at a share of the group price. ESU will coordinate the Insurance policy and liaise with the broker. The Insurance will include standard directors and officers insurance and general liability insurance coverage (including, but not limited to: officer indemnity, working with youth, host liquor liability and bodily injury and property damage at normal Branch events.) The Branch may request that ESU assist the Branch in obtaining additional insurance riders if the Branch requires coverage exceeding the scope of the Insurance.

- \$1,000,000 Each Occurrence/Claim Limit for Bodily Injury and Property Damage
- \$2,000,000 Aggregate Limit (total in a policy year)
- \$1,000,000 Non-Owned and Hired Auto Liability Limit

Host Liquor Liability – covered under General Liability limits as long as you are not selling or distributing liquor for a charge. The venue at an event can provide or charge for it. You should get a certificate of insurance indemnifying ESU in these cases.

Umbrella / Excess Liability: \$4,000,000 provides excess coverage above the General Liability limits.

Directors & Officers Liability: \$1,000,000 limit per claim with a \$5,000 retention/deductible per claim. Any officer / director of the organization or its branches is included.

Employment Practices Liability: \$1,000,000 limit per claim with a \$2,500 retention/deductible per claim. Covers employee based claims against the organization.