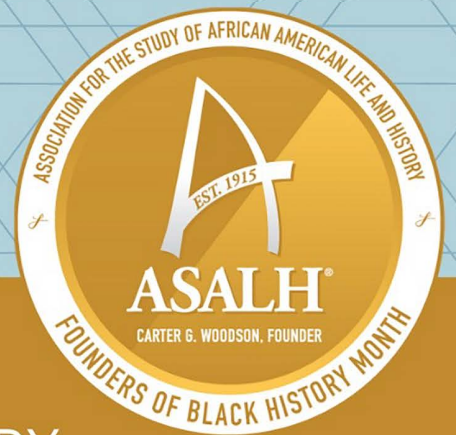


ADOPTED 6/14/2022
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BRANCH PROCEDURAL

Manual



ASSOCIATION FOR THE STUDY OF
AFRICAN AMERICAN LIFE AND HISTORY

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LANGUAGE USED

Below is a guide on the acronyms or descriptions used throughout this document:

ASALH	Association, National and Headquarters
Active or current member	Individual or Institutional Member whose dues are up-to-date
EC	Executive Council
ED	Executive Director
MC	Membership Committee
OB	Organizing Branch
OC/Committee	Organizing Committee
VPM	Vice President for Membership

I. Introduction

The Association for the Study of African American Life and History, Inc. (ASALH) is providing this Branch Procedural Manual to establish a common base of understanding on the purpose, creation, and functioning of a branch. The Manual is intended to provide members with the information needed to start and operate a successful branch.

Branches are needed as much today as when they were created by Dr. Carter G. Woodson. Many thanks to our members for volunteering your time and talents to champion ASALH's mission of protecting the legacy of our ancestors and their central role in U.S. history. We understand that starting and operating a branch is a major commitment and undertaking and have designed this Manual to be both a useful and user-friendly resource. Additional thanks to branch members for giving valuable input to this project.

The document is divided into 10 major sections that cover the scope of branch operations. Supplementary information is contained in 15 appendices that include writeable templates, embedded links and a resource page. This Manual serves to document existing policies, as well as clarify, innovate, and document operating procedures. It also shows how to set strategy to meet priorities. You will note a focus in the following areas: continuous training for branch officers, ASALH's responsibility to prepare branches to run effective operations, and the accountability of branches to provide member value and fulfill requirements set out by ASALH.

One of ASALH's requirements is for each branch to create a constitution and bylaws document that outlines the standards for good governance and operation of that branch. Branches formed after the adoption of this Manual must use the Model Constitution and Bylaws provided, which is easily adaptable to the needs of any branch. Existing branches may find it beneficial to conform their constitution and bylaws to this more comprehensive model.

We commit to keeping this Manual current by updating it with information that responds to your needs and feedback. Despite our best efforts to be comprehensive, you will find that some of the guidance is unavoidably general in nature given that each branch is different and has unique needs.

We invite you to communicate with us about the content of this **Manual** at any time by contacting the Vice President for Membership at VPformembership@ASALH.org.

Kindest Regards,

ASALH

ASALH MISSION

To promote, research, preserve, interpret, and disseminate information about Black life, history, and culture to the global community.

II. Organizational Statements

These statements summarize the aims, direction and values of ASALH.

Who We Are

The Association for the Study of African American Life and History, Inc (ASALH), was founded on February 9, 1915 in Chicago and incorporated on October 2, 1915, under the laws of the District of Columbia as a 501 (c) 3 nonprofit, tax exempt professional organization. ASALH was founded by the late Dr. Carter Woodson, a Harvard trained scholar and international educator who was the son of former slaves.

ASALH operates as the National Organization, local and international branches to promote greater knowledge of African American history through a program of education, research and publishing.

Mission

Our mission is to promote, research, preserve, interpret, and disseminate information about Black life, history, and culture to the global community.

Vision

The vision of the Association for the Study of African American Life and History is to be the premier Black Heritage learned society with a strong network of national and international branches and partners whose diverse and inclusive membership will continue the Woodson legacy.

Official Goals

1. The collection of sociological and historical data on the Negro,
2. The studies of peoples of African blood,
3. The publishing of books in the fields of African American History and Sociology, and
4. The promotion of harmony between the races.

Official Tag Lines

ASALH's registered trademarks in the United States Patent Office.

- (1) Founders of Black History Month™
- (2) If we don't tell them, the world will never know™
- (3) Knowledge for Empowerment™

III. ASALH Important Dates and Events

Below is a schedule of key organizational timelines, many of which are highlighted throughout this document.

	Scheduled throughout the year at 8:00 p.m. EST	Branch Leaders/Members Conference Call
January 1		Membership dues for ASALH and branches due
January		Branch annual programmatic report due to ASALH National by January 15
February		Branches are required to hold a Black History Month (BHM) public program BHM Virtual Festival Executive Council meeting
March		Read Across America (Read a Woodson Title) Branch annual financial report due to ASALH National by March 31
April, 2 nd Friday		Nominations for Executive Council due
May 1		Branches send request to be chartered or rechartered at next conference
June		Executive Council will vote to approve chartering or rechartering of Organizing Branches request at EC meeting in June
July		Early bird registration deadline for annual meeting and conference Ad deadline for Conference souvenir journal
August 31		Required donation due to National from branches; recommended \$600 minimum as annual donation
September		Branches required to have a Founders Day program (September 9) Annual Meeting and Conference in late September or early October Branch workshop at Annual Conference (Reports from prior year due)
Oct - Feb		Annual membership drive; membership payments made after fall conference expire in December the following year
December		Branches required to host a Woodson birthday program (December 19) (Submit your event by October 15 and receive a complimentary kit) Mail membership dues to ASALH National to be received before January 1 st

IV. Branch Purpose and Relationship with ASALH

A. Purpose of Branches

ASALH's Bylaws Section 5b states that "...The function of such Branches shall be to stimulate study and to carry on research in local history, and to disseminate such findings to the office of the Executive Director. An annual report of Branch activities (including memberships) shall be presented to the Executive Council at its June meeting."

Branches are as relevant today as when they were created by Dr. Woodson as local centers to promote and recognize the accomplishments of African Americans through vehicles such as Black History Month, his brainchild. Recent themes reminiscent of the past on social justice and the teaching of African American History only serves to remind us that the effort to weave the African American experience into the story of American is ongoing.

We know that a shared purpose is what brings people together, and this concept of community is ASALH's foundation. No doubt, Dr. Woodson recognized the value of communities when he structured the ASALH collective with a National office and a network of local branches. It is believed that Dr. Woodson's Christian faith informed this umbrella structure and the naming of local affiliates as branches. This nomenclature is thought to be steeped in the scripture found at John 15:5¹ which is explained as Jesus speaking to his disciples to carry the message of the good news. Dr. Woodson saw this scripture as a metaphor for his work as an advocate for fundamental human justice that could be carried out only through community, specifically branches.

Over the years, branch members have honored Dr. Woodson's intent by enthusiastically championing ASALH's mission within their own communities. Ultimately, branches will need to evaluate their strategies and tactics to determine if they will meet continuing needs. As time elapses and torch bearers fade, an important question to ask is: how does the branch help new generations find meaning, purpose, and information sufficient to invest in the mission that inspired earlier generations?

¹ John 15:5 scripture verse from the New International Version reads: "I am the vine, you are the branches. If you remain in me and I in you, you will bear much fruit; apart from me you can do nothing."

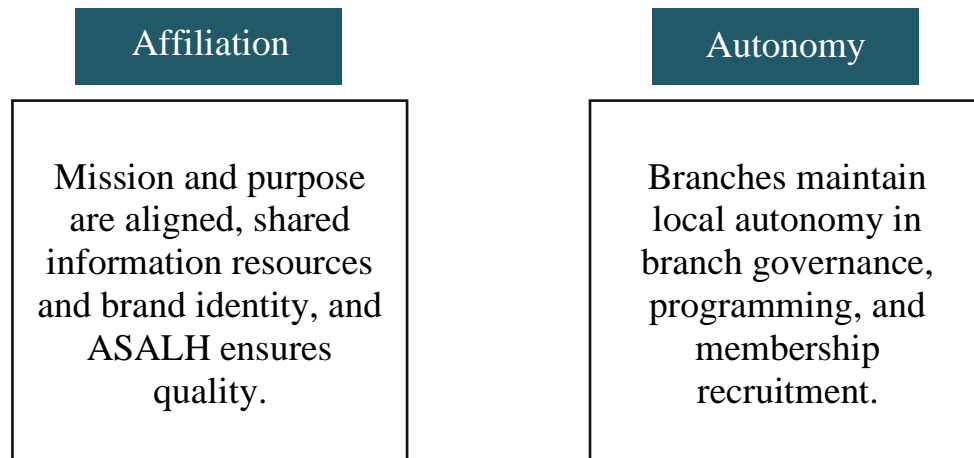
B. Relationship of Branches to ASALH

Branches have both an affiliation and organizational relationship to ASALH.

1. Affiliation

Branches are direct affiliates of the ASALH National organization, aligned in mission and purpose but subordinate with respect to establishing the terms of governance. At the same time, branches have an independent governing body. The relationship, as shown in Figure 1, allows ASALH to extend its scope through the branches, subject to all of its goals, guidance and regulations.

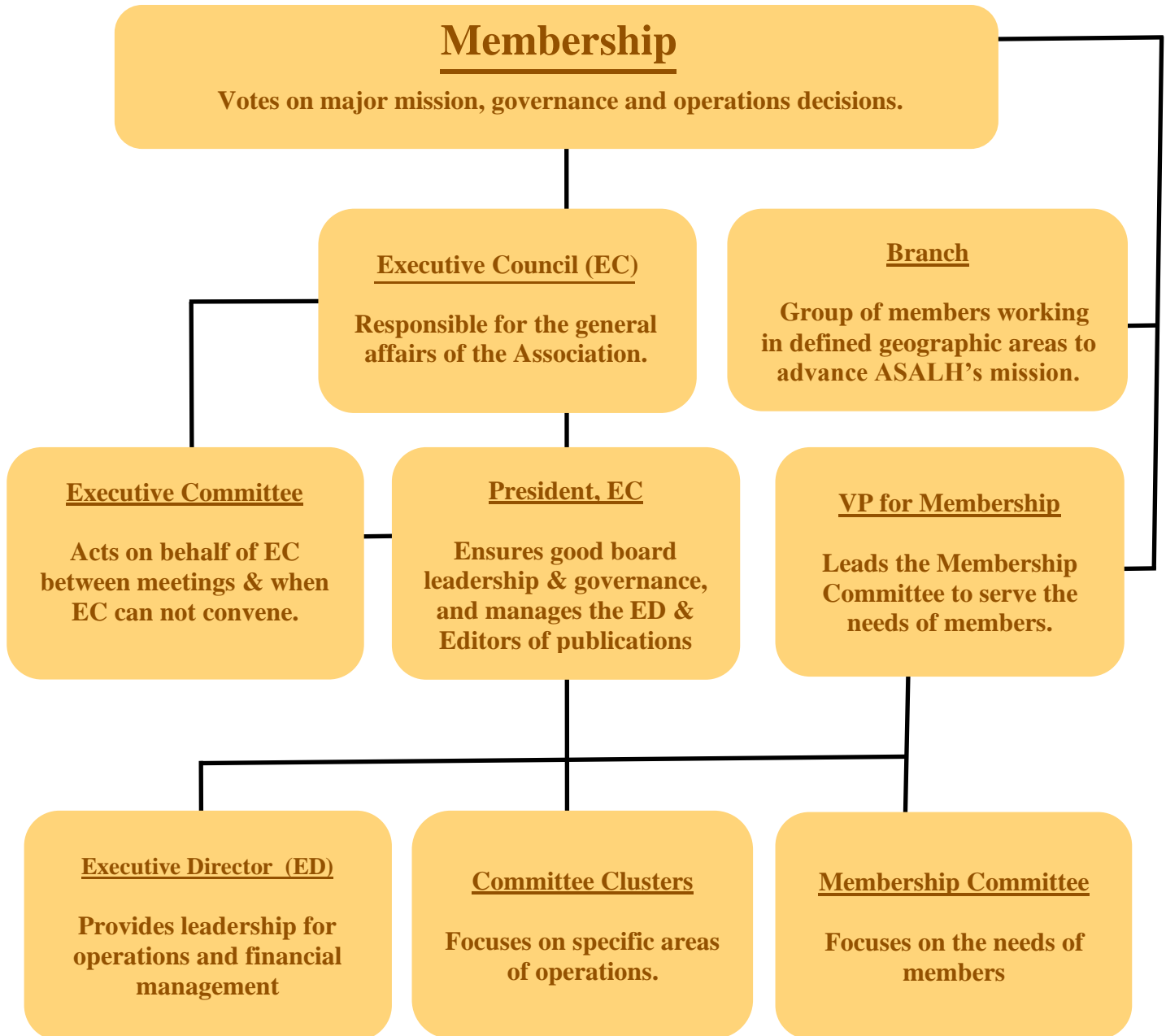
Figure 1: Affiliation and Autonomy



2. Functional

The functional or organizational relationship between branches and ASALH National is principally through the governance structure established to achieve its shared mission, as shown in Figure 2:

Figure 2: ASALH Functional Governance Structure



V. Formation of a Chartered Branch

ASALH enthusiastically supports the formation of new branches and invite members to inquire about forming a branch in their communities. On April 1, 2022, ASALH had 46 chartered branches across 23 states. This number fluctuates slightly from year to year as new branches are chartered and due to the loss of branches that, unfortunately, are not able to fulfill the requirements of their charter. The information in this Manual should make it easier for members to form a branch and sustain its operations at a successful level that avoids the loss of branch affiliation. The branch formation process is depicted in Figure 3.

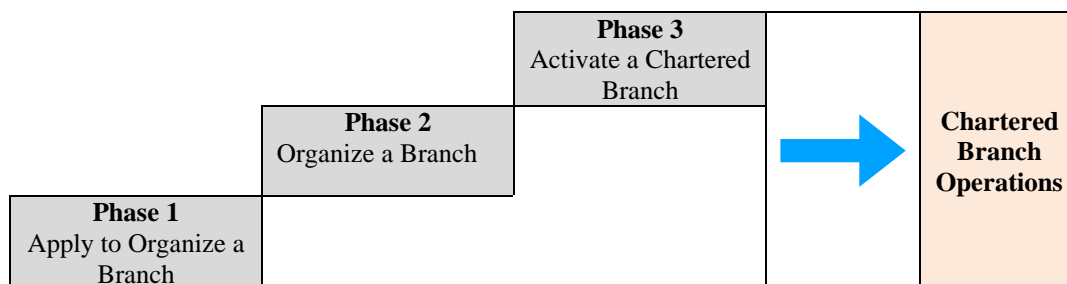
Email is the primary vehicle used by ASALH to communicate with branches. This refers to communication both during the branch formation process and for chartered branch operations.

ASALH’s Constitution, Article IV, revised September 2021, grants the Executive Council (EC) authority to establish branches as feasible. Accordingly, the EC has established criteria for the chartering of a branch as described below. The branch formation process is in three distinct and successive phases: applying to organize a branch; organizing a branch and activating a chartered branch. Once the charter is activated, the branch becomes a formal operating entity.

Branches shall be established by a majority vote of the Executive Council upon the recommendation of the membership committee (MC). Branches may be chartered outside the United States.

ASALH’s Bylaws, Section 2b, states that “The Vice President for Membership shall work closely with the President in all business pertaining to the Association and shall chair the membership committee. The Vice President shall supervise campaigns for membership and serve as the liaison between the Executive Council and the branches.” In practice, the Membership Committee (MC) is responsible for member services, and it is the committee that originates recommendations to the EC for the approval relative to branch business. References to the VPM throughout this document constitute a direct reference to the membership committee and also imply the VPM or designee.

Figure 3: Branch Formation Process



A. Apply to Organize a Branch

The application process is described in the following table.

Table 1: Application Process

Criteria
ASALH members interested in exploring the creation of a locally chartered branch must file a formal application for review. A realistic assessment of a branch's potential is the critical first step in ensuring that it can succeed.
Application
<ol style="list-style-type: none">1. Submit by September 1, Application to Form an ASALH Branch shown as Appendix 1, per instructions. Apply only when ready to move to the next phase in the process, the organizing phase.2. The VPM will immediately provide a copy of the application to the ED.3. The VPM shall advise the EC of the application.4. The MC will assess the application to determine the feasibility of a branch, with attention paid to the following factors:<ul style="list-style-type: none">- Support that can reasonably be expected from the community for ASALH required public education programs and branch activities.- Potential to attract and maintain at least eight (8) active ASALH members as an organizing branch and 15 active members including one (1) institutional member as a chartered branch, where an active member is defined as having paid dues. Members may join more than one branch.- Commitment from interested members sufficient to a) form an organizing committee (OC) to manage and advance the branch to the charter phase, including fielding a slate of candidates and b) run in the branch's first elections for branch officer positions (President, Vice President, Secretary, Treasurer and Historian).<p>Election of officers is a prerequisite for chartering.</p>
Authorization
ASALH reserves the right to approve or decline the application based on an assessment of its merit. <ol style="list-style-type: none">1. The MC may decide to recommend the application to the EC for approval at its November meeting or decline the application if it identifies deficiencies that cannot be readily corrected.2. The EC may accept or decline a positive recommendation from the MC.3. The VPM will communicate any decision made by the MC or EC to the Applicant within 48 hours of the decision.4. When the recommendation is approved by the EC, the applicant moves to Phase 2 of the process (Organize a Branch).5. When the application is declined either by the EC or MC, the VPM shall advise the applicant of the reason(s) and how to enhance the application to be eligible to reapply in the next application cycle.
Timeframe
The application process will take three (3) months to complete, September - November

B. Organize a Branch

On the January 1 following authorization by the EC, an organizing branch (OB) is launched. The purpose of the organizing phase is to prepare for chartering. The January 1 launch date effectively aligns the business year for the ASALH operations: National Office, Organizing Branch, and Chartered Branch.

1. Organizing Committee

In anticipation of the EC's approval of the application in November to form an OB, the Applicant must establish an Organizing Committee (OC or Committee) by November 1. The OC will have responsibility for managing OB operations in its provisional phase and for shepherding it through chartering. The OC has temporary status and its authority automatically terminates on the December 31, following the granting of charter status or revocation of the Organizing Branch Agreement. On January 1, elected officers will assume management of a newly chartered branch.

Members of the OB will use a voluntary or simple voting process to establish the Committee. Due to its limited scope and duration, the Committee shall consist of three members: President, Secretary/Treasurer and Historian. The qualifications and duties for these positions are like those of branch officers described in the Model Constitution and Bylaws (**Appendix 3**).

OC members will not be restricted from running for elected office and time served on the Committee will not limit the time that they can serve in elective office.

ASALH will approve the OC and its members as part of the provisional process. Duties of the Organizing Committee include:

- a. Serve as the point of contact (POC) with ASALH to organize the branch, manage OB operations, and petition for charter status.
- b. Sign the Organizing Branch Agreement (President).
- c. Define for membership approval, the service area for programs and member recruitment.
- d. Recommend for membership approval, the Branch Name. Usually, the name is linked to the geographic area or a symbolic figure. It cannot be named after a living person.
- e. Develop for membership approval, parameters for the constitution and bylaws and a draft of the document, using **Appendix 3** as the guide.
- f. Present the initial slate of candidates and hold elections for branch officers.
- g. Organize and conduct membership meetings
 - The initial meeting to introduce OC members and their role, assess overall support for the parameters of the constitution and bylaws, and discuss the path to chartering. A recommended agenda is shown on page 16 (5).
 - The annual meeting to approve the constitution and bylaws and elect officers, among other activities. A recommended agenda is on page 17 (9).
 - Additional meetings as needed.
- h. Prepare and submit annual reports for the business year due in January, even though the submission occurs after the Committee's term expires.

2. ASALH Initiatives

Organizing branches can expect ASALH to fully welcome and support them with information and resources. The MC led by the VPM will ensure a smooth start-up. An OC can anticipate that the VPM will promptly announce the branch and communicate next steps.

Table 2: Initiatives

(1) Announcement	(2) Welcome Letter
<p>VPM will within seven (7) days of the EC’s approval of OB:</p> <ol style="list-style-type: none"> Announce the new OB to the general membership and invite members to join and support the branch. 	<p>VPM will within seven (7) days of the EC’s approval of the OB:</p> <ol style="list-style-type: none"> Send a signed and personalized Welcome Letter to the Applicant. Request that the Applicant submit a completed Branch Officers Form by December 5, in this case, for the OC. Request that the Applicant submit a photo of the President, OC, by December 5.
(3) Organizing Branch Agreement ² & Other Documents	(4) Orientation
<p>VPM will within 5 days of receiving the completed Branch Officers Form, exchange information with the President, OC:</p> <ol style="list-style-type: none"> Send Organizing Branch Agreement for signing by the President, OC, and request that it be returned by December 20. Request submission of the OB membership list by December 20. Provide OB version of ASALH logo³ 	<p>VPM will immediately upon receiving the Branch Officers Form for the OC, invite the OC to an orientation designed for OBs. VPM will invite appropriate EC members and executive staff to participate.</p> <p>The orientation will ideally take place between January 2 - January 12 and the agenda may look as follows:</p> <ol style="list-style-type: none"> Welcome and Congratulations Ice Breaker Introductions Role of Organizing Committee Overview of ASALH⁴ Importance and Role of Branches Timeline to Create Branch Constitution & Bylaws and Elect Officers ASALH Annual Requirements for an OB Pathway to Charter Status How to Use ASALH Website (helpful to demonstrate live and for each attendee to follow along on their, as able) Other Information Critical to Success of an OB Q&A Adjournment

²A sample Organizing Branch Agreement is shown as Appendix 2.

³ ASALH has created specific logos consistent with its naming convention for branches. See page 27 for guidance on use of the logo.

⁴ The ASALH Overview at <https://asalh.org/branch-members-call/> can be used for this and other orientations.

3. Organizing Branch Response and Initiatives

The branch is expected to timely respond to the foregoing requests from the VPM to successfully incorporate itself into ASALH’s operations. As the OB phase is to prepare for chartering, the OB must also meet certain milestones to qualify. The required responses to the VPM’s requests and other essential submissions are itemized in the table below.

Table 3: Organizing Branch Action Steps

(1) Establish Organizing Committee	
By November 1, interested members must establish an OC in anticipation of the EC’s approval to organize a branch,. The OC will manage the OB during its year of organizing for chartering.	
(2) Branch Officers Form for OC	(3) Organizing Branch Agreement ⁵ & Membership
By December 5, the President, OC shall respond to the VPM’s request to submit the following information for the OC: 1. Branch Officers Form https://asalh.org/members/branch-directory/branch-officers-and-officers-changes/ 2. Branch President Photo https://asalh.org/members/branch-president-photo-submission/	By December 20, President, OC shall submit: 1. Signed Organizing Branch Agreement. 2. List of active branch members.
Receipt of this form triggers the onboarding of the OC.	The Organizing Branch Agreement formally recognizes the relationship between the branch and ASALH and gives it provisional rights to participate in branch activity while the charter process is completed.
(4) Constitution & Bylaws ⁶	(5) Start-up Meeting ⁷
OC to prioritize creation of constitution and bylaws using the model in Appendix 3. • Create a first draft within six (6) weeks of EC authorization to organize. • Create a final draft within four (4) months . Apply and adapt the constitution and bylaws as it is being developed to ensure that fit the needs of the branch. Approval of a provisional constitution and bylaws by members is a condition for chartering. Members must subsequently ratify the ASALH approved version at its first chartered branch meeting in January.	OB shall by January 30, hold a meeting of members to confirm direction. • Invite committed and potential members to meeting. • Develop and distribute an agenda at least 10 days in advance with a minimum of the following items for discussion: 1. Welcome & Introductions 2. Organizing Committee Members & Purpose 3. Name & Geographic Area to be Served 4. Official Mailing Address 5. Mission & Goals 6. Organizing Branch Agreement Commitment(s) 7. Constitution & Bylaws Parameters 8. Path to Charter Status 9. Required Programs & Potential Activities 10. Need to Field Slate of Candidates for Elections 11. Membership Recruitment • Maintain meeting minutes indefinitely.

⁵ A sample Organizing Branch Agreement is shown as Appendix 2

⁶ Organizing branches are required to use the **Model Constitution and Bylaws at Appendix 3**.

⁷ Appendix 3 provides guidelines on conducting membership meetings.

Table 3: Organizing Branch Action Steps (Cont'd)

(6) Member Recruitment and Retention	
Branches have a core responsibility to maintain a strong and stable community of local members.	
From the outset, an OB must develop strategies to deliver member value by providing opportunities that satisfactorily engage members. A satisfied member will generally renew their membership. Simultaneously, the branch must actively recruit new members because it takes both of these efforts to maintain membership at the level required by ASALH, which is 8 members for an organizing branch and 15 for a chartered branch. Section X of this Manual provides a more extensive discussion of membership.	
(7) Operating Plan	(8) Media
An OB is required to develop a summary plan that states how it will fulfill specific conditions as a chartered branch.	OBs should develop a website and social media capability to the extent possible.
The plan should show capacity to successfully: <ol style="list-style-type: none"> 1. Execute the required three (3) public education programs: Black History Month, Founder’s Day and Woodson’s birthday 2. Engage branch members 3. Recruit new members 4. Contribute a recommended \$600 to ASALH by August 31 (first year as a chartered branch). 	Today, organized entities are expected to have a website and social media presence to communicate with current and prospective audience.
The OB should view this plan as a long-term strategy for upcoming years. Include goals and cite outcomes for events that occurred during the organizing year.	Review Section VI on Chartered Branch Operations for a more complete discussion of communications and marketing.
(9) Annual Meeting to Vote on Bylaws & Elect Officers ^{8,9}	
Before May 1, hold an Annual Meeting that is governed by the draft constitution and bylaws. Regarding the flow of the meeting, approve the constitution and bylaws, then officers can be elected. Going forward, after obtaining charter status, fall is the recommended timeframe for holding the Annual Meeting.	
Activity and Agenda: <ol style="list-style-type: none"> 1. Publicize the meeting to members 2. Develop and distribute the agenda at least 10 days in advance. The agenda should cover at least: <ul style="list-style-type: none"> • Welcome & Introductions • Constitution & Bylaws (vote required) • Dues, if applicable (vote required) • Budget for upcoming year (vote required) • Introduction of Initial Slate of Candidates for Elections • Floor Nominations for Additional Candidates (no motions required) • Election of Branch Officers (vote required) • Motion to Seek Charter Status (vote required) 3. Maintain meeting minutes. 	

⁸Candidates for election must be eligible per the constitution and bylaws and remain so during their term.

⁹ Elected officers begin their terms on January 1; the Organizing Committee terminates on December 31.

Table 3: Organizing Branch Action Steps (Cont'd)

**(10)
Cash Management**

Given that OBs will open a bank account only after chartering, financial transactions will need to be cash based for a portion of the operating year. Once a bank account is established, the OB must immediately switch to using bank checks, which provide a better audit trail.

To account for cash transactions, the branch must use a **manual** journal entry system.

- A cash receipts journal to summarize all cash receipts.
- A cash disbursements journal to summarize all cash disbursements.
- Follow all internal controls for cash management outlined on page 38.

It is anticipated that OBs will have fewer transactions compared to a chartered branch, as is characteristic of start-up operations and given that OB's are not granted the authority to collect dues as a provisional entity. Notwithstanding the volume, all financial transactions must be accounted for.

**(11)
Operating Year Requirements**

There are specific requirements for which the OB is accountable in its provisional year, as listed below.

1. Submit complete, timely and accurate annual Financial Report for the operating year by January 31st.
2. Maintain at least eight (8) active members
3. Approve a branch constitution and bylaws document
4. Elect a minimum of five (5) branch officers per the branch constitution and bylaws
5. Hold three (3) public programs:
 - Recognize Black History Month in February
 - Recognize Founder's Day, on or around the official founding of ASALH, September 9
 - Recognize Founder Woodson's birthday on or around his official birthdate, December 19
6. Represent the branch at Annual Conference and chartering ceremony, preferably the elected President or another Officer and Historian will attend.
7. Participate on branch calls led by the VPM with the appropriate representation, and disseminate the information received.
8. Develop an Operating Plan to be implemented in the first year as a chartered branch.

4. Petition for Charter Status

An OB is ready to apply for a charter when it can demonstrate the capacity to meet the range of requirements of a chartered branch. It must submit an application and be approved for chartering.

Table 4: Charter Petition Process

Branches in the Charter Process
New charters - organizing branches. Recharterers - branches that have been discontinued and are seeking reinstatement.
Criteria
<ul style="list-style-type: none">• Charter status can be activated only by ASALH National.• Charter status is granted to an OB by the EC upon approval of the Application for Charter Status shown as Appendix 4. <p>The application process for rechartering is described in Section VIII B of this Manual.</p> <ul style="list-style-type: none">• Submit the application by the May 1 deadline, per instructions provided on the application.
Submission and Approval
<ul style="list-style-type: none">• By May 1, confirm that all conditions for chartering identified on the Application for Charter Status have been met by submitting a completed application.• The MC will evaluate whether the conditions for chartering have been satisfactorily met and make a recommendation accordingly to the EC at its June meeting.• The VPM will communicate the outcome to the President, OC within 48 hours of the decision.• If the motion is denied, the VPM will advise the OC of the deficiencies so that they can be corrected in a new application that the OB may submit in next application cycle. Failure to qualify in the initial cycle may be the result of missed deadlines, non-submissions, poor quality and non-responsiveness to inquiries from the VPM.
Application Expiration
<p>An OB that is not approved for a charter may continue for a second year in a provisional capacity to stay eligible to re-petition in the next application cycle.</p> <p>If after two years, the branch is unable to qualify, the Organizing Branch Agreement will be revoked, eligibility will expire, and the chartering process will terminate. Consequently, it is imperative that branches communicate any challenges they experience as soon as they occur.</p>
Timeframe
The charter petition process will take two (2) months to complete, May - June.

C. Activate a Chartered Branch

After completing all steps and the EC approves the OB for chartering at its June meeting, the newly chartered branch is introduced at a chartering ceremony¹⁰ held at ASALH’s Annual Meeting and Conference in September.

Ideally, all elected branch officers will attend the ceremony but at a minimum, the President or another officer is expected to participate in the ceremony. If possible, the Historian should attend to record the event as part of the history of the branch.

Newly chartered branches can anticipate additional documents and will need to take further steps to activate the branch charter as described below.

Table 5: Branch Activation Steps

Welcome Letter signed and personalized to the elected Branch President, with a copy to each elected Officer	The letter is the opportunity for the President of ASALH to congratulate the Branch President and other Officers on their election and express appreciation to them for serving as charter officers.
Thank You Letter signed and personalized to the President, OC with a copy to each Committee member	The letter is the opportunity for the President of ASALH to recognize and thank the OC for successfully starting a branch and leading it to charter status.
Signed Branch Charter	The charter formally recognizes the relationship between the branch and ASALH and clearly specifies that as an affiliate, the branch operates according to the policies and practices established by ASALH.
Signed Constitution and Bylaws	ASALH’s signature validates that it meets the standard of the model document. Although already adopted by branch members in a recorded vote, it must be ratified at its first chartered branch meeting in January to confirm the name change from “Organizing Branch” to “Chartered Branch” and other possible changes made by ASALH.
Login Credentials	Any credentials needed to access general or restricted areas of the ASALH website will be provided to new Branch Officers.
Employer Identification Number (EIN)	Within 10 days of chartering , a branch must apply for an EIN. The branch name on the EIN must be as stated in its Charter. The branch is considered not in good standing if this requirement is not met. Appendix 5 discusses the purpose and process to obtain an EIN.
Establish Bank Account	Within 15 days of obtaining an EIN , submit indicated documents as proof of a bank account established in accordance with the constitution and bylaws: <ul style="list-style-type: none"> • The first bank transaction as proof of a bank account to conduct financial business, such as, deposit dues, collect fundraising payments, make payments and send contributions to ASALH. • A copy of the first bank statement to confirm the account is correctly named. <p>The branch is considered not in good standing if this requirement is not met.</p>

¹⁰Outside of the ASALH chartering recognition, arranging a charter signing and framing ceremony with members and local media is one way to publicize the branch and create a memorable experience for charter members and everyone in the community

Table 5: Branch Activation Steps (Cont'd)

<p>Orientation Requirement for officers of Newly Chartered Branches</p>	<p>An orientation date will be announced at the Charter Ceremony after prior coordination with elected officers of the newly chartered branches. The orientation will be conducted by the VPM with support from EC members and executive staff. This is a leadership development training that should occur within six (6) weeks of chartering and no later than November 1 to prepare officers for their January 1 start date. The branch is considered not in good standing if officers do not attend the orientation.</p> <p>The agenda will focus on building performance capacity and transitioning to a formal branch. The VPM may invite an established branch to share their experience as a peer mentor. This pairing of an established branch with a newly chartered branch could even be developed as a support/mentoring model beyond the orientation session.</p> <p>The Chartered Branch Orientation Agenda may look as follows:</p> <ol style="list-style-type: none"> 1. Welcome & Congratulations 2. Introductions 3. Overview of ASALH 4. Importance of Branches 5. Role of Branch Officers 6. Overview of ASALH’s programs 7. Calendar: ASALH events, submitting EIN# and bank information 8. ASALH’s online systems: Login requirements, website content, tools and resources (toolkits for marketing & communications, membership recruitment, flyers/brochures, and newsletters) <ul style="list-style-type: none"> -helpful to demonstrate live and for each attendee to have a computer to follow along, as able 9. Records management system and responsibility for keeping records (Appendix 6) 10. ASALH logo guidelines 11. Requirements for branch to be in good standing 12. Strengths & opportunities based on performance as an organizing branch 13. How to use Branch Manual 14. Presentation by Established Peer Branch: “Factors Critical to Branch Success” 15. Adjournment
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D. Summary Calendar for Branch Formation

The calendar in the table below recaps activities and due dates relative to the formation of a chartered branch.

Table 6: Calendar for Branch Formation

Phase	Activity & Due Date for Branches						
Apply to Organize Branch	➔	By September 1	Within 48 hours of EC vote at November meeting		By November 1		
		Submit application to VPM.	Expect decision on application.		Establish OC.		
3 months to complete the application phase (September - November)							
Organize Branch	➔	By December 5	By December 20	January 1	January 1	By January 30	
		President, OC to submit Branch Officers Form.	President, OC to submit 1) Signed original of Organizing Branch Agreement and 2) Membership list.	Launch the organizing branch.	Immediately begin to engage and recruit members.		Hold startup branch meeting
		By February 15	Before May 1	Before May 1	By May 1 (4 months after launch)		
		OC to create initial draft of constitution & bylaws and a final draft within four (4) months.	OC to conduct annual meeting to elect officers and hold other votes.	1) Meet all requirements for an OB and 2) Complete the Application for Charter Status.		OC to submit Application for Charter Status that the EC will vote on at its June meeting.	
8 months to complete the organizing branch phase (January - August).							
Activate Chartered Branch	➔	In Late August/September		Within 10 days of chartering	Within 15 days of getting EIN	By November 1	
		Branch receives charter at charter ceremony during Annual Conference, preferably with the elected President and Historian attending, but at a minimum, one elected officer to attend.		Branch to apply for a State Employer Identification Number (EIN).	Branch to submit: 1) proof of established bank account and 2) copy of first bank statement.	Attend new chartered branch orientation.	
		4 months to complete the branch activation phase (September - December).				12 months to complete the branch formation process (January - December)	
Chartered Branch Operations	➔	January 1:					
		Start of business year.		Start of elected officers' terms.		Start of branch operations.	

VI. Chartered Branch Operations

On January 1, a newly chartered branch joins existing chartered branches in conducting the full scope of branch operations. This section of the **Manual** is geared to help branches deliver consistent performance. It identifies and classifies key operating activities into the categories below, indicates whether the activity is an operating requirement, a legal/regulatory requirement or mostly helpful, and provides guidance.

Branch Administration	Programs	Communications & Marketing
Branch Officer Development	Succession Planning	Finance

A. Branch Administration

Strong branch administration and leadership will grow and sustain a branch.

- 1. Branch Governance:** The elected officers required by ASALH manage the branch. The branch is governed by elected officers, who are accountable for meeting expected governance and management standards discussed throughout this Manual and as may be added by ASALH. A minimum of five (5) elected officers are required. A Parliamentarian is also required, but this position is appointed by the Branch President. Additional officers may be elected but positions beyond the five stipulated by ASALH must be approved by the VPM and identified in the constitution and bylaws. Refer to the Model Constitution and Bylaws (Appendix 3) for more information.
- 2. Officer Installation Ceremony:** This is an optional activity that can build pride. A branch may choose to hold a formal installation ceremony to thank out-going officers and to welcome new officers. The ceremony is best scheduled for the January meeting when outgoing officers would swear-in the in-coming officers. Guidance on holding an installation ceremony can be found on the website at <https://asalh.org/wp-content/uploads/2020/01/SAMPLE-INSTALLATION-OF-OFFICERS-CEREMONY-officer-descriptions-included.pdf>
- 3. Scheduling Conflicts:** Branches are expected to observe the ASALH calendar. Page 8 of this Manual shows the ASALH Calendar of Events and Activities. Branches must avoid scheduling meetings or other events that would conflict with this calendar or any other activity announced by ASALH. If a branch proposes a program that conflicts with the ASALH schedule, ASALH has the right to ask the Branch President to reschedule the activity.
- 4. Privacy:** Branches must comply with privacy laws and make the issue of privacy a priority. Members should expect to have their privacy rights respected. Branches must ensure that the information of members is not passed on to a third party without members' consent unless it is required by law. The branch is responsible for securing members' personal information and using it only for the purpose it was provided.

5. **Branch Membership Meetings:** These are activities required by ASALH.

a) *Meetings for branch members are convened by the VPM as follows:*

- Four (4) general meetings during the year with the remainder focused on specific issues or stakeholder groups, such as, branch presidents.
- Time is 8:00 – 9:00 pm; agendas are emailed and posted on the website.
- At least one member of each organizing and chartered branch is required to attend the general meetings.
- Invitees to special issue/stakeholder meetings must make every effort to attend.
- Any member may attend any scheduled meeting, with the understanding that the special issue/stakeholder meetings are highly focused.
- Attendees have the responsibility to disseminate the information discussed, as needed.

b) *Branch meetings are convened by elected branch officers as follows:*

- A minimum of four (4) membership meetings per year.
- Annual meeting, preferably in the fall, to elect new officers, approve budget and conduct other business.
- Meetings convened either in person or virtually.
- Only active members of the branch can vote on motions.
- Meetings are open to all members. Members may attend branch committee meetings as observers.
- Meeting proceedings must be recorded¹¹.
- Records of meetings must be retained indefinitely.

6. **Change in Circumstance:** This is an administrative process to update records.

Branches are required to promptly report any change in status.

- a. An established branch that wants to change its defined geographic area of service must submit a request for approval to the VPM. If approved by the MC, it proceeds to the EC for final approval before the physical location can be redefined.
- b. Branches must submit the names of all officers by January 1 each year and any officer changes within 15 days of the change using this form: <https://asalh.org/members/branch-directory/branch-officers-and-officers-changes/> In addition the photo of a new president must be submitted at <https://asalh.org/members/branch-president-photo-submission/>
- c. A change of branch address must be filed with the ED as soon as it is known and with the appropriate federal and state agency relative to a 501(c) 3 designation or EIN registration.

¹¹ Sample minutes are located on the website at: <https://asalh.org/wp-content/uploads/2020/02/Meeting-Minutes-Sample.pdf>

7. **Branch Annual Reports:** The reports are required for annual planning and tax filings.

Each branch must submit the following annual reports on the due dates shown.

Table 7: Branch Annual Report Due Dates

Report Required	What's In It	Due Date	How to Submit
Annual Financial Report	Typical financial statement by revenue and expense categories for the year just ended.	March 31	Link

Data from programmatic reports are used to assess the overall health of ASALH, plan, make budgetary decisions and fundraise. Relative to fundraising, these data are combined with ASALH National's data to support the Combined Federal Campaign (CFC) application, which drives the report's March 31 due date. CFC is a workplace philanthropic program that provides federal employees the opportunity to support various causes.

Data from financial reports are combined with data of ASALH National to file a consolidated 990 Tax Return. The 990 filing is required under the Internal Revenue Service (IRS) code for 501 (c) 3 organizations. Given the purpose of the reports, it is important that branches submit documents that are complete, accurate and timely to enhance fundraising opportunity and avoid tax penalty.

As the official representative of the branch, the President is accountable for accurate and timely submissions. The President may work directly with other officers to satisfy the requirement.

8. **Membership Level:** ASALH requires that chartered branches maintain a minimum of 15 members including at least one institutional member to be considered in good standing.

ASALH has established a minimum membership level of 15 for chartered branches based on the responsibilities that a branch must carry out and the experience with branches that have fewer members. Generally, with fewer members, a branch struggles to field candidates for elections and fill other volunteer roles, obtain a quorum for meetings, and support branch programs. Fewer members translate to fewer resources and less can be accomplished.

ASALH employs a tiered membership model at both the national and branch level. This requires an institutional member as one of the 15 branch members. is a common and increasingly popular membership model. benefits an entire organization as opposed to an individual. This model is increasingly more common among associations for its potential to expose the branch to a broader market segment, diversify the approach to decision-making, create a meaningful partnership in research, and provide financial contributions.

9. **Lift Every Voice and Sing:** This song is required for official branch events.

This song, known as the "Black national anthem" was adopted by the Executive Council for all official events held by the ASALH collective. Branches are expected to incorporate it into their programs; however, it is currently not a compliance requirement.

10. **ASALH Publications:** Branches are expected to support works published by ASALH. Branches may review the publications available for sale and their descriptions at <https://asalh.org/document-category/publications/> A discount is offered on books and posters purchased in bulk. The discount varies by publication and a bulk purchase consists of 10 or more of the same item.

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In addition, a discount is also offered on the ASALH store for merchandise purchased in bulk.

11. **Website:** An essential and recommended asset.

A website is effectively the gateway into an organization and today it is the most important administrative asset for sharing information. Through the website, a branch can communicate with members and help promote its programs and events to the general public.

Each branch is encouraged to launch its own website. Many small organizations create their websites on the Facebook (now Meta) platform. This is a no-cost option but has a downside in that not everyone subscribes to Facebook. There are many online articles that show how to create a Facebook site should a branch decide to pursue this option. Outside of Facebook, website creation is a very technical undertaking and branches should choose an experienced and well-respected web designer to work with.

Website architecture is constantly evolving but for now, the general parameters recommended for a branch website are:

- Present the branch logo appropriate to the branch status as discussed on page 35.
- Keep it simple and easy to use.
- Keep content and design current to be useful and not detract from the ASALH brand.
- Provide an email address that is tied to the branch instead of a personal email, to reduce exposure to scams.
- Designate someone to monitor the email account for messages and provide follow-up.
- Include at a minimum, the following headers with appropriate content.

Table 8: Website Content

Home	ASALH	About Us (Branch)	Events	Membership	Programs
<u>Dynamic Landing Page</u>	Describe the National Organization <u>About ASALH</u> <u>ASALH site</u>	<u>Mission</u> <u>Vision</u> <u>History</u> <u>Elected Officers</u> <u>Constitution & Bylaws</u> <u>Contact</u>	<u>Calendar</u> Branch, national, and partner events	<u>Benefits</u> Promote membership <u>Join/renew ASALH member</u> Join/renew Branch member <u>Members Only Section</u>	<u>Programs</u>

For branches with insufficient resources to create and maintain a website, ASALH offers support by way of a dedicated page hosted on its website. The template for a branch page is as follows:

- About Us (branch history; elected officers; constitution & bylaws and contact)
- Calendar (Events, description of events and how to attend)
- Branch Membership (Benefits, Join)

Branches that need to have their websites hosted by ASALH must submit a request along with the content listed for the branch page template to: VPM at _____. It is the responsibility of the branch to keep the website current by providing updates to the VPM.

ASALH commits to exploring a single solution software provider that would optimally allow individual branches to opt into the system through a subscription. This system provide integrated content management, such as, website, membership, and event registration database.

12. Toolkits: These are resources for branches.

ASALH provides information in the form of toolkits to support different areas of branch development. Toolkits are currently available in the areas identified below:

Table 9: Toolkits

Annual Meeting and Conference media	https://asalh.org/conference/media-toolkit/
Branch History	Appendix 7 provides a template for writing branch history
Black History Festival	https://asalh.org/festival/media-toolkit/
Planning branch events	https://asalh.org/wp-content/uploads/2020/02/Guide-for-Planning-Branch-Events...Committee-Functions-update.pdf
Media Toolkit	https://asalh.org/brand/
Membership Recruitment: <ul style="list-style-type: none"> ▪ Institutional member Recruitment ▪ Churches Rejoin 	https://asalh.org/branch-members-call/
Study Guide for the Book "The Mis-Education of the Negro" by Carter G. Woodson	https://asalh.org/wp-content/uploads/2017/06/final-woodson-mis-education-study-guide-2008.pdf

13. Branch Privileges: This describes benefits to Branches.

As advocates for ASALH in their communities, branches enjoy a few privileges:

- Full privileges to serve as ASALH’s local representatives.
- A complimentary print copy of the Journal for branch members.
- Access to scholars from the Speakers Bureau for branch events at no charge.
- Access to ASALH National for advice and support.
- Access to ASALH programs that can be used to engage and recognize members with certificates, such as, *The Black Family* at <https://asalh.org/family-history/>
- Use of ASALH’s name and logo as an affiliate, for official branch activities.
- Use of branch membership list, for official branch business.
- Complimentary listing of branch activities on ASALH’s website.

14. Death Notices: To provide expressions of sympathy.

Condolences are issued through the Office of Executive Director on the passing of members, family members of members, or close personal or professional individuals of the branch. Upon notification and if contact information is provided, ASALH will send expressions of sympathy to the next of kin. For deceased persons in any of the categories above, please submit the remembrance form: <https://asalh.org/members/asalh-member-remembrance/>

15. **Information Request:** This relates to member services and external relations.

To contact ASALH about specific items, such as, promoting your book on the website, requesting a news/information posting on the website, or for general inquiries, please submit the information request form: <https://asalh.org/contact-us/>

16. **Records Management:** This is to preserve records for legal and historical purpose.

Branches must implement a records management system, which is the administration of records from their creation to disposal. Valuable records must be maintained in an orderly manner and for a prescribed period to have them readily accessible for business operations and to comply with regulatory and ASALH requirements. The benefits of records management include easy retrieval, preservation of knowledge, and elimination of non-essential records and clutter.

- a. Records Identification - Branches should develop rules to identify and track records to ensure that the right document is stored. For instance, frequently generated official documents such as minutes, committee reports, orientation documents and forms can be tracked for version control. Often used controls include clear titles indicating the stage of the document, such as, draft 2 or final draft, date, authorization status, and original or copy.

The records placed in the records management system must have certain properties:

- i. Authentic (it is what it says it is).
- ii. Reliable (full and accurate representation of whatever it attests to).
- iii. Integrity (complete and unaltered).
- iv. Be of value from research, administrative, legal and fiscal perspective.

The records themselves can be either in paper or electronic format. Electronic records include document files, databases, spreadsheets, emails, and internet documents (website).

- b. Records Storage: The storage system may be manual, such as, filing cabinets, electronic or a combination of both. Each branch should decide on a storage system that suits its circumstances and resources (space availability or computers). The system should be secure, functional, accurate, reliable and user-friendly.

The way in which records are stored, whether in paper or electronic format, may depend on:

- i. the purpose, ii. the type, iii. How long the records must be kept, and iv. Access needs.

Records must be stored at a designated place, with the Secretary having custody of all non-financial records and the Treasurer for all financial records. If these Officers do not personally have sufficient or appropriate space, records can be stored elsewhere or with a commercial storage company for a fee. The custodian of paper and electronic records should be the same. Electronic records must be backed up on a hard drive and/or stored in the cloud.

- c. Records Retention - Each record or document that the branch receives or transmits has a lifecycle. A retention schedule is the best way to ensure that records of value are maintained. Some records must be retained permanently either for historical value or by government regulations. A retention schedule is shown as **Appendix 6**.
- d. Records Disposal: Records may be destroyed after their retention period has expired per the retention schedule. No records should be destroyed without the authorization of designated custodian. Some libraries, university related or public, may value branch records pertaining to the social history of the region. The branch may consider an arrangement to have the library permanently store some of their records.

B. Programs

Branches execute a combination of national and local programs.

1. **National Programming:** Branches are required to fully execute National Programs.

ASALH has three (3) national programs to promote its vision and mission through events that celebrate historical milestones and bring awareness to the role of African Americans in the American experience. Each branch must hold a public event to recognize these three programs:

- a. Black History Month (BHM) every February, which may be held in conjunction with ASALH's BHM Virtual Festival. (The branch can purchase the annual BHM theme materials for this event).
- b. Founders 'Day every September, on or around the official founding on September 9).
- c. Woodson's birthday every December on or around the official birthdate of December 19.

As an incentive, all branches that submit Carter G Woodson birthday events by October 15 will receive a complimentary kit with posters and bulletin.

2. **Speakers Bureau:** This is a resource for branches.

ASALH provides branches access to the Speakers Bureau as a resource for events, programs and meetings. Speakers are provided free of charge and the speakers list is kept up-to-date. For more information or to request a speaker, visit <https://asalh.org/speakers-bureau/>

3. **Other Branch Programs:** -These are suggested activities to support branch needs.

Each branch has flexibility to conduct branch business, including organized activities outside of the three national programs, provided they conform to ASALH's mission. The purpose of the activity can run the gamut from raising funds to engaging members. The type of event can vary from literary to purely social, recurring or one-offs, or held in partnership with ASALH, other branches or local institutions. A guide for planning events is located at <https://asalh.org/wp-content/uploads/2020/02/Guide-for-Planning-Branch-Events...Committee-Functions-update.pdf>

Table 10: Suggested Programs

Hold a branch anniversary.	Hold a local program and secure a speaker from ASALH Speakers' Bureau (Encourage others to use the Speakers' Bureau.).	Organize group attendance to Annual Conference
Organize trips to local Black history sites.	Conduct a student bowl on African American History with a local school/college.	Sell books published by ASALH Press (branch buys books in bulk at a discount).
Conduct author book talks/signings.	Conduct a local reading of Carter G. Woodson's manuscript <i>Appeal</i>	Conduct Woodson Franklin Talks
Conduct a reading of <i>The Mis-Education of the Negro</i> using the official study guide at https://asalh.org/wp-content/uploads/2017/06/final-woodson-mis-education-study-guide-2008.pdf		
Interview veterans for the Veteran's History project, co-sponsored by <i>The Library of Congress</i> . (Inquire at Headquarters about additional veteran's collaborative programs)	Conduct a Veteran's Day project that includes the Veteran's History Project and/or programs with your local veteran's organizations	
Form partnerships with local organizations including libraries, colleges, churches, etc. for the above events or other initiatives		
An additional resource for programs is: https://asalh.org/wp-content/uploads/2021/06/SUGGESTED-PROJECTS-AND-FUNDRAISERS-FOR-ASALH-BRANCHES.pdf		

C. Communications and Marketing

ASALH provides a platform for members/branches to keep current with the latest news from other members and branches, publicize their own news, and post and seek jobs.

1. **Publicity for Branch Activities and Member News:** This is one way that ASALH supports branches and execute a dues benefit for members.

Branches and members can promote their news and activities without charge on the ASALH website by submitting the applicable form below:

To publicize important **branch events**—

<https://asalh.org/members/branch-informer/#events>

To publicize important **branch news**, submit this form—

<https://asalh.org/branch-news-submit-form/>

To publicize important **member news**, submit this form—

<https://asalh.org/members/current-member-news-submission/>

For **member event**, submit—

<https://asalh.org/members/current-member-event-submission/>

For **member books** with links to purchase them, submit—

<https://asalh.org/submit-to-the-members-bookshelf/>

To list **jobs** and see job openings—

<https://asalh.org/category/job-board/>

2. **Social Media:** A recommended tool to promote the branch.

Social media is a digital tool that many organizations use as an efficient way to reach and retain their audience. Prominent social media brands include such companies as Meta-Facebook, X, Instagram and LinkedIn, and there are others.

Figure 4: Logos of popular social networking platforms



Growing a following on social media can take time and a consistent presence is required to engage and grow a base of supporters. As a tool, social media has developed broad acceptance and Meta (Facebook) is wildly popular among all demographic groups. Social media is the platform most attractive to the younger population at this time.

Organizations of all types and sizes recognize that social media is critical to reaching customers and particularly the younger demographic. They will say that their business success depends on and it has the potential to be a transformative tool for branches as well. Cost/ benefit analyses show that the cost of investing in social media platforms outweigh the cost of the investment. Moreover, the cost of social media is lower than the cost of other media.

The benefits of a social media presence most mentioned include:

- i. Establishes and increases brand awareness.
- ii. Elevates visibility of the brand, giving greater impact to its advertising/marketing efforts.
- iii. Provides for immediate delivery of messages (through push communication) for promoting events and community engagement.
- iv. Reaches a broad and diverse audience to attract potential customers.
- v. Provides multiple communication channels for supporters to experience community that include immediate engagement, communication exchanges, live interactions, and networking.

Each branch will need to decide whether social media would make a compelling change in the direction of the branch relative to branding, member recruitment and program attendance. The branch would then have to invest in social media expertise to develop and implement a strategy tailored to its needs. This strategy would include goals to be achieved, content to post, calendar for posting, what to post, who will post, assessment of performance against goals and when to adjust goals.

Once implemented, the branch can stay connected and share the conversations that are top-of-mind for ASALH by following its tweets at <https://twitter.com/asalh> and reposting them.

3. **Recruit new members to maintain and grow membership:** This is a required marketing activity to achieve the stated outcome.

As a membership organization, membership growth is fundamental to sustainability and ASALH could not exist into the future without replacing the members it loses each year. And to increase its presence and impact, it must grow. Membership growth is a measuring stick of the organization's ongoing health and in Dr. Woodson's structuring of ASALH he made branches key to its long-term existence. Membership including recruitment is discussed more fully in section X.

A sample recruitment letter is shown at <https://asalh.org/branch-members-call/>

4. **Membership Renewal.** Branches are required to implement a renewal campaign as a way to retain members.

Each year ASALH National runs a membership renewal campaign jointly with branches during the period of October 1 - December 31 to create synergy among the organizations with the expectation that this will strengthen the outreach. Notwithstanding this renewal drive, branches are expected to recruit members throughout the year. A sample membership renewal letter is shown at <https://asalh.org/branch-members-call/>

5. **Marketing Plans.** A resource to support activities.

Marketing is a tool used to promote and sell products, services and ideas. The intent is to capture the attention of the targeted audience with a compelling narrative or advertisement that persuades them to take the intended action, such as, attend an event or make a purchase. To be effective, in the intended action must be performed in a specific and simple way, for example, click here.

Almost anything can be marketed, and any size organization can engage in marketing, but product and brand recognition are important factors in determining marketing success. Every major undertaking in an organization including marketing should be shaped by a strategy, which has many decision points. The strategy helps to clarify where you are, where you want to go and how to get there. A streamlined architecture of a marketing strategy may look as follows:

Table 11: Marketing Strategy for an Event

<p>Describe the event including the purpose.</p> <p>Ensure that no other major event is scheduled that would compete with the program.</p>	<p>Event Name:</p> <p>Event Date:</p> <p>Event Times:</p> <p>Event Venue/s:</p> <p>Event Details:</p>	<p>Founder’s Day Recognition</p> <p>Saturday, September 10, 20—</p> <p>4:00 PM</p> <p>Town X Library, Room C</p> <p>A Debate on the relevancy of Black History Month by the members of the Town X Debate Team.</p>
<p>Rationale for Marketing</p>	<p>To get as many out to hear discussion on a subject that is very relevant to our entire community.</p>	
<p>Key Event Marketing Goals</p>	<p>Outline the key goals of the plan. Include specific goals with actual targets. Examples:</p> <ul style="list-style-type: none"> • Attract at least 60 people to the event from within the community. <ul style="list-style-type: none"> - Achieve at least 50% return attendees from the prior year. - Generate greater attendance from institutional member through employees and customers. • Increase attendance of members by 20% over the previous year (from 20 to 24). <ul style="list-style-type: none"> - Target participation of members by contacting each member at least times. • Increase the number of new people attending the event. <ul style="list-style-type: none"> - Focus on a new demographic, such as, community college students who are not engaged with the branch. 	
<p>Audience</p>	<p>Define audience in specific detail, for instance, the main group of people to attract and the second group of people to attract, age, gender, where they are from, what they like, what they read/listen to/watch/engage with, etc.</p> <p>A vague audience will require more resources and it will be difficult to reach everybody.</p> <p>Examples:</p> <ul style="list-style-type: none"> • Primary target audience: Active, potential, and lapsed members • Secondary target audience: College students who have not attended a branch. 	
<p>Key Message</p>	<p>Determine event branding and key message(s) that will be consistently used across the marketing campaign. The message can be informational or motivational (why people should attend). It must be succinct, relevant and engaging to the audience.</p> <ul style="list-style-type: none"> • Brand Examples: <ul style="list-style-type: none"> -The ASALH Town X Branch logo will be used in the promotional campaign: -The “tag-line” will be “If we don’t tell them, the world will never know!” -The following images will be used to promote our event: (e.g., Dr. Woodson’s photo) • Key Message Examples: <ul style="list-style-type: none"> - Date and venue - Specific messages - e.g., “Dr. Woodson’s Legacy as Seen by Young Leaders” - Event will be dynamic and thought provoking for a diverse audience. - Stay for Q & A and light refreshments at the end of the debate. 	
<p>Marketing Support and Partnerships</p>	<p>Outline marketing support (e.g., organizations to contact) and any marketing or media partners. Examples may include Town X Library, Publix Supermarket, WXY FM Radio, Town X University, website designers, social media experts, printing suppliers, etc.</p>	

Key Stakeholder - Communication Plan	<p>Identify key stakeholders (those impacted or likely to impact the event). Identify how, what, when and who will communicate with them. For example:</p> <p>Stakeholder: Sponsors What: Approval for use of their logo Message: Keep them up-to-date with event progress How: Email When: Every other Friday Who: Vice President</p>		
Marketing Activities	<p>There are several marketing tools available, and branches will have different options depending on their size and resources.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><u>Marketing Tools</u> Word of Mouth Email</p> <p><u>Publicity</u> Radio Public Service Announcement Social Media</p> <p><u>Plan</u> Sustained 2-month presence on social media</p> </td> <td style="width: 50%; vertical-align: top;"> <p><u>Online</u> Calendar of Events Listings</p> <p><u>Marketing Materials</u> Flyers, Posters</p> <p><u>Plan</u> One-time distribution of flyers on the college campus and at community center.</p> </td> </tr> </table>	<p><u>Marketing Tools</u> Word of Mouth Email</p> <p><u>Publicity</u> Radio Public Service Announcement Social Media</p> <p><u>Plan</u> Sustained 2-month presence on social media</p>	<p><u>Online</u> Calendar of Events Listings</p> <p><u>Marketing Materials</u> Flyers, Posters</p> <p><u>Plan</u> One-time distribution of flyers on the college campus and at community center.</p>
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Budget	<p>Do you have money to support this marketing and how much? Identify all income and expenses associated with the marketing plan, including cash and in-kind contributions.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><u>Income</u> Marketing Budget: Direct sponsorship by Target -\$1,000 In-kind sponsorship from Publix -\$500 In-kind sponsorship from WXI FM - \$500</p> <p>Total: \$2,000</p> </td> <td style="width: 50%; vertical-align: top;"> <p><u>Expenses</u> Marketing Budget: Design of Flyers by Town Designers - \$500 Printing by Town Printing - \$250 Refreshments by Publix - \$500 Advertising by WXY FM - \$500</p> <p>Total: \$1,750</p> <p>Amount raised \$250</p> </td> </tr> </table>	<p><u>Income</u> Marketing Budget: Direct sponsorship by Target -\$1,000 In-kind sponsorship from Publix -\$500 In-kind sponsorship from WXI FM - \$500</p> <p>Total: \$2,000</p>	<p><u>Expenses</u> Marketing Budget: Design of Flyers by Town Designers - \$500 Printing by Town Printing - \$250 Refreshments by Publix - \$500 Advertising by WXY FM - \$500</p> <p>Total: \$1,750</p> <p>Amount raised \$250</p>
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Success	Attendance was 75 and increased 50% year-over-year, 30% of attendees were college students.		
Evaluate	Review and adjust for the next marketing plan.		

6. **Use of Logo:** Proper use of the logo is required.

Uniform use of ASALH’s name and logo is essential for creating a global recognizable identity and to appropriately reference branches and their activities.

Branch specific logos have been created consistent with ASALH’s naming convention for branches. These affiliate logos shall be deployed consistent with the following guidelines to ensure that the logo will always be visible, look attractive and used as intended:

- Identify the branch with the logo appropriate to its stage of development.
 - Organizing Branches should use the “Organizing XYZ Branch” logo.
 - Chartered Branches should use the “XYZ Branch” logo.
- The recommended placement of the logo on the branch website for the greatest prominence is in the top half of the page.
- These marks must **not** be altered, other than to increase or decrease the size, proportionally.
- The logo may not be placed on stationery or business cards for political, commercial or personal use.
- The logo may not be used in a derogatory manner.
- The logo may not be combined with any other object(s).
- Only the designated branch logo may be used on communications material, websites and promotional items.
- Electronic artwork is available for the Secretary, who shall monitor its use:
<https://asalh.org/members/branch-media-toolkit/>.

Figure 5: Example Use of ASALH Logo



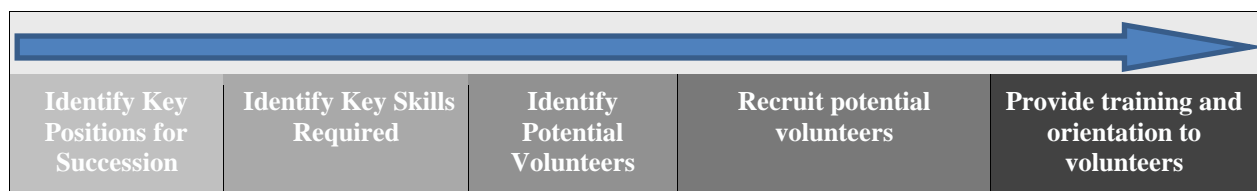
D. Succession Planning

Succession planning: Branches are encouraged to engage in succession planning, the process to identify and develop candidates for officer and other volunteer leadership roles in the branch.

Succession planning is an effective way to grow and sustain the branch. It is perpetual because elections are ongoing. As one cycle culminates with the election of officers, the next cycle begins for identifying new candidates. With their direct experience in elective roles, branch officers are expected to take an active part in identifying and developing potential candidates.

Key elements of the process are illustrated in the figure below.

Figure 6: Succession Plan Continuum



1. Identify positions - Identify the position first and then the individual(s) who would best fit that role. The objective is to identify potential candidates for key roles in advance to create a pipeline for when vacancies occur.
2. Identify skills - Use position descriptions in the Model Constitution and Bylaws to pinpoint the skills, experience and knowledge required for the key position(s). These skills may include leadership, detail focused, and problem solving.
3. Identify potential volunteers - These are individuals who have the skills, experience and knowledge to be a great addition for the role. Diversity and Inclusion are objectives in identifying candidates.
4. Recruitment - It is not always known what experiences or involvement will move a member to seek or agree to volunteer, so branch officers must use different tactics to encourage interest:
 - a. Publicize volunteer opportunities so members know how they can contribute.
 - b. Be flexible with scheduling, someone may not be available to welcome attendees but available for closing out the event, or two people may have to share an assignment.
 - c. Directly ask and encourage specific members to help in areas where they have an interest or experience.
 - d. Get to know members and encourage them to volunteer for leadership roles.
 - e. Create short-term assignments, such as ad hoc committee work, for those not able to commit to long-term assignments or are incremental in their involvement.
5. Onboarding - Once great volunteers are identified, the branch must invest in them by providing a robust orientation accompanied by documentation on key branch operations.
6. Branch Peer to Peer Tips - Branches that have implemented a successful process are encouraged to broadly share their strategies with other branches.

E. Branch Officer Development

Officer Training: Branch officers are required to attend scheduled development training.

ASALH offers leadership development training opportunities and resources for branch officers. Additional training can be expected, especially in technology. Current training includes:

Table 12: Branch Office Development

Branch workshop	A branch workshop is conducted at the Annual Conference each year, which branch representatives, not exclusively branch officers, must attend. The workshop is structured to provide the training needed to help branches perform better. The Conference also offers the opportunity for peer networking where attendees can get new ideas to take back to their communities.
Single Issue Workshop	As needed, ASALH will conduct workshops focused on a single issue, especially when it becomes evident that several branches have questions on an issue and are unsure of how to proceed. An example of this may be a workshop conducted by ASALH National’s Treasurer on how to complete the Annual Financial Report.
Branch Officer Orientation	The VPM conducts a new officers orientation annually to provide an overview of ASALH, train officers about the goals and responsibilities of their positions as well as answer any questions that they have.
Branch Officer Onboarding	Per the constitution and bylaws, each branch is required to conduct an orientation to effect a smooth transfer of duties and knowledge at the branch level. Outgoing officers must conduct the orientation for new officers prior to January 1. This onboarding allows for continuity of branch operations with minimal disruption. A suggested orientation agenda is shown in the Model Constitution and Bylaws.
Ongoing Branch Officer Training	Beyond the orientation for branch officers, training will be offered at least once a year for this group. Continuous training is needed to reinforce prior training and increase the knowledge base of officers as they gain experience in their roles.
Monthly Branch Member Meetings	The VPM has purposed some of the monthly meetings for special focus or stakeholder training, such as, for vice presidents.
ASALH TV Offerings	Branch officers can at any time avail themselves of video trainings housed on ASALH TV, such as, a workshop on Financial Literacy. In addition, the general You Tube site has a wealth of training information on almost every topic.
Other	ASALH commits to providing training in areas that will help branch performance, using various methods including ASALH TV.

F. Finance

A strong financial management foundation and record-keeping system is key to branch stability and success. There are several inexpensive small business accounting software available today that branches may want to consider using.

1. **Employer Identification Number:** This is a requirement to be a branch in good standing. Each branch must apply for its own state employer identification number (EIN) within 10 days of chartering. This nine-digit number is used for filing income and payroll tax returns. Banks and financial institutions require this number to set up an account for your branch. See Appendix 5.

2. **Branch Bank Account:** This is a requirement to be a branch in good standing. A checking account, preferably interest bearing, must be established in the name of the branch within 15 days of receiving an EIN. The branch must use its own EIN (not an individual's SSN) to establish an account. The branch president and treasurer are the authorized signers. Both signatures are required for payments of \$2,500.00 or more.

Below are best practices for maintaining a branch checking account:

- a. Never place the branch's money in any officer's personal checking account. This would constitute co-mingling of funds and could result in tax problems for the officer.
- b. A good control over cash disbursements is to require two signatures on every check or perhaps on checks over a certain pre-determined dollar amount, as indicated above.
- c. Check signers should not be responsible for reconciling the checkbook.
- d. For well-funded branches, determine if excess cash should be invested in safe investments (savings account, money market account, or certificate of deposit (CD)) if those instruments pay a higher interest than the checking account.

3. **Cash Management:** This provides best practice for branch cash management.

- a. *Cash Journals* - The branch will maintain two cash journals:
 - Cash Receipts Journal used to summarize all cash receipts.
 - Cash Disbursements Journal used to summarize all cash disbursements.

These journals are used for both the cash and accrual method of accounting. Even small organizations have now automated this journal entry process with software, such as, *QuickBooks* or similar programs. For branches with a total of 50 or fewer transactions per year, a checkbook is sufficient.

- b. Internal controls over cash transactions.

Internal controls are procedures adopted within an organization to safeguard its assets and check the accuracy and reliability of its accounting data. Strong internal controls can help minimize the possibility of misappropriation of assets or misstatement of accounts while increasing the likelihood of early detection if they do occur.

Basic internal cash management and accounting controls are reflected below:

- i. Checks should be restrictively endorsed. Spell out the full name of the branch (not an acronym), write the branch's bank account number, write the restrictive endorsement "For Deposit Only".

- ii. Deposit check/cash as soon as possible after receipt. Make a copy of the check, once the deposit is made, attach the stamped deposit slip to a copy of the check. Make a note about the purpose of the monies and then attach the stamped receipt.
- iii. Promptly record these transactions in the cash receipt journal. This step helps to detect errors made by either the branch or bank and keeps financial records current.
- iv. Documentation supporting the deposit must be maintained on file for audit and legal purposes in compliance with the records management requirement.
- v. Invoices must be approved with a signature by the President before a check is issued.
- vi. Checks should always be written to a specific payee.
- vii. Supporting documentation, such as, invoices or letters, should be attached to a copy of every check, then filed after issuance of the check. Mark or stamp all invoices "PAID" to avoid duplicate payment.
- viii. Payments should be made by check and not in cash (exception is organizing branch who should use cashier's check or money order) to decrease the likelihood of misappropriation and to provide an audit trail.
- ix. The treasurer of the branch should review the canceled checks and entries on the bank statement and investigate any suspicious payments.
- x. The treasurer shall ensure that bank statements are reconciled against journals or checkbooks on a monthly basis. A timely reconciliation alerts the branch of any differences between its records and the cash transactions processed by its bank. Any discrepancies should be investigated immediately.
- xi. Internal controls are strengthened if the budget and finance committee reviews the monthly cash reconciliation to ensure that the transactions were authorized.

4. **Fundraising:** This is an essential and encouraged activity.

Most nonprofit organizations must actively raise funds to support their needs. Fundraising will differ across branches depending on factors, such as, local interests and the type of strategy the branch can plan and execute. Options for fundraising generally available to community organizations include:

- a. Ticket sales. This includes the sale of tickets for entry to an event, for food, or for an auction. Check with your state and local jurisdiction to determine if there is any special licensing or authorization needed for ticket sales.
- b. Sponsorships. Many national and local companies sponsor activities aligned with their brand as a way to market products while doing good. In exchange, the sponsor's name is prominently displayed at the event (program, website, apparel, and giveaways). Sponsorship amounts will depend on the company's sponsorship budget, the expected return on brand recognition and sales, and its social objectives.

The process to obtain a sponsorship is straightforward. Branches must research a potential sponsor's reputation, interest, and past sponsorships to know if it is a good fit. Then tailor the branch's ask to the company's interest to increase the chance for a favorable response. Another reason to research the company is that the right sponsor from a respected brand may help to increase ASALH's recognition. At the same time, a

perceived conflict between ASALH's values and a sponsor's brand could detract from the organization's image and lessen public support.

The branch will want to:

- ii. Request funding at least six (6) months in advance as sponsorship budgets are allocated very early in the company's business year. Sponsors also tend to support the same event from year-to-year, so getting locked in with a sponsor should be an objective.
- iii. Send a thank-you to the company for the sponsorship immediately after it is received. The branch can also send a follow-up acknowledgement with an update on the funded activity after it has occurred.
- iv. Ensure that sponsors or outside speakers who participate in branch activities do not promote political agendas.

A sample sponsorship request letter is shown as **Appendix 8**.

- d. Contributions. These are charitable donations and they are secured in a way similar to sponsorships.

A sample contribution request letter is shown as **Appendix 9**

- e. Grants. Foundations and government-related organizations fund projects they support with grants. A branch is more likely to receive grants from local organizations because of its size and community-based outreach. However, funding opportunities for community-based organizations can improve in certain social climates.

Grants must be applied for with an application that leaves a strong impression as the awards process is typically competitive. Usually, the award is tied to a specific cause, evaluated on outcomes, and has a defined deliverable and timeline.

The internet offers a great deal of data on grants and a resource for comprehensive and current information is <https://www.grantwatch.com/> Like sponsorships, it is incumbent upon the branch to research grantors and grant requirements to decide where the opportunities are.

When successful in obtaining a grant, it is critical that the branch complies with all stated requirements to retain eligibility to apply for grants in the future.

ASALH advises that a branch should obtain a 501 (c) 3 designation if it intends to seek grants as a revenue source on a recurring basis. ASALH grants only limited pre-approved use of its 501 (c) 3 identification as discussed in sub-section 6 below.

- f. Other: There are other limited opportunities available to branches to raise funds.
 - i. Amazon Smile <https://org.amazon.com/> is a micro-donation program that allows its customers to register a charity, to which Amazon will donate funds based on the purchase activity of that customer (and all other customers who register that charity).
 - ii. Several other micro-donation sites exist that branches can explore. These platforms generally leverage mobile technology, the trend now in nonprofit fundraising.

- iii. Endowment giving can be explored, and although not out of the question, it is generally not available to small community organizations. Endowments are almost exclusively the province of large, perpetual institutions like universities, hospitals, foundations, museums and even churches, which leverage their size, inherent and enduring influential role in society to build these funds.

One thing to note is that endowments are designed to fund institutions into the future, not in the short-term. They are typically created with donor restrictions that do not allow the funds to be used to solve current operating needs. That is why, unfortunately, institutions with millions in endowment dollars are forced to lay off employees because they are short on current funds.

5. **Safeguarding 501 (c) (3) Tax Exemption:** This is background information to build awareness of what is required for ASALH to maintain its tax status.

ASALH is a 501(c) (3) nonprofit professional organization that receives a federal tax exemption. As such, it must obey certain rules established by the IRS to retain its tax-exempt status. As affiliates, each branch must also comply with these rules:

a. Form 990 Tax Return

ASALH must file a Form 990 tax return each year. Information for the tax filing comes partly from the annual reports submitted by branches. This underscores the importance of filing complete, accurate and timely annual financial reports. Similarly, by regulation, branches must maintain these records indefinitely. Failure to comply with these requirements jeopardizes ASALH's tax-exempt status.

b. Non-Allowed Activities

Branches need to be aware of activities that 501(c) (3) organizations cannot engage in to guard against unknowingly becoming involved with them.

Branches may not:

- i. Engage in political campaign activity to financially support or endorse any political candidates verbally or in writing. They may not oppose candidates either. This rule applies to candidates at every level: local, state and federal.
- ii. Engage in lobbying activities-to urge members to support or oppose legislation.
- iii. Permit personal benefit from its income or assets to insiders, such as, officers and members.
- iv. Allow individuals or other organizations to have private benefit from donations, or for uses that are not aligned with the purpose of ASALH's mission.
- v. Generate Unrelated Business Income, in other words, too much income from a purpose that is unrelated to that of ASALH.

6. **Use of ASALH's 501 (c) (3) Identification:** This is the policy on use.

Upon prior written prior approval, branches may use ASALH's Tax ID.

a. Criteria and Process to request use of ASALH's Identification:

- i. A branch may request use, provided the annual reporting requirement is met. However, the granting of such request is at the sole discretion of ASALH National and a branch's commitment to an activity or vendor does not obligate ASALH National to grant use.

- ii. Submit request with details as early as possible but no less than **14 days** in advance of the activity to the Executive Director at scyrus@asalh.org and indicate:
 - Date of Activity
 - Type of Activity
 - Purpose of Activity
 - Vendor Name, Address, Tax ID, Contact Person and Phone No.
 - Prior experience with vendor
 - Transaction Amount

b. Branch 501 (c) 3:

A branch interested in recurring grant funding or large-scale fundraising activities should apply to have its own tax-exemption because ASALH does not have the capacity to oversee grants for potentially multiple branches. The accountability and tax liability attached to tax-exemption requires that ASALH exercise complete control over the use of its ID, which means that it needs to approve every transaction on a grant.

When a chartered branch decides to pursue its own tax exemption, the necessary language should be included in the constitution and bylaws. An organizing branch may not apply for 501 (c) 3 designation because it has a provisional status.

Registration is the sole responsibility of the branch. However, ASALH's Executive Director can provide guidance. **See Appendix 5** for additional information.

7. Annual Contribution: This is a required branch donation.

ASALH's work is only possible through the generosity of those who believe in Dr. Woodson's vision to research, preserve and promote Black heritage. It has been a practice of branches to make an annual donation to the National Organization. Today, a donation is required from all chartered branches. The expectation is that each branch will make a suggested minimum \$600 annual monetary contribution directly from the branch's funds, to be received by ASALH no later than August 31 each year.

8. Support for Annual Conference and Meeting Attendance: Branches are required to send representatives.

Branches are expected to provide financial support for required representation at the Annual Meeting and Conference:

- i. For a branch going through the chartering process, it must send at least the president or another elected officer and the historian for the chartering ceremony.
- ii. For at least one (1) representative every three (3) years for training, enrichment and peer networking.

9. Reimbursement of Dues: This is an administrative process to transfer funds.

In cases where a member inadvertently pays its branch dues to the National office, that office shall forward to the branch the amount collected, within 15 days of the discovery or notification by the branch.

In cases where a member inadvertently pays its National dues to the branch, that branch shall forward to ASALH National the amount collected, within 15 days of the discovery or notification by the National Office.

10. **Tax Filings:** This is a legal requirement.

- a. 1099-MISC - A branch must file Form 1099-MISC for each person, other than corporations, to whom it has paid at least \$600 during the calendar year for any of the following:
 - i. Services that were not performed as an employee (such as, independent contractor, speaker)
 - ii. Prizes and awards
 - iii. Rents or royalties
- b. Form 990EZ - Short Form Return of Organization Exempt from Income Tax. This is the form used if gross receipts are normally more than \$25,000 but less than \$100,000 and total assets at the end of the year are less than \$250,000. A Form 990 can be filed in lieu of this return.

11. **Investments:** This is an optional activity to create income for branches with unused cash. Branches that realize annual income in excess of expenses on a consistent basis may want to invest the excess funds (funds not currently required for current operating expenses). Each branch must evaluate its own financial situation and cash flow needs when making investment decisions.

To guide the investment of excess funds, an investment policy should be established and approved by members.

Each type of investment takes on a different degree of risk and cost. Typically, the greater the opportunity for asset appreciation and income, the greater the risk associated with an investment. Among the safest investments, for example:

- a. U.S. Treasury Bills and Notes are backed in full by the United States Government and are virtually risk free.
- b. CDs have relatively low risk, but currently pay almost no interest.
- c. Mutual funds and corporate stocks and bonds are other types of investment vehicles but are less conservative and have greater risk.

Note that the Federal Deposit Insurance Corporation (FDIC) insures only \$100,000 per financial institution, not per account. A branch should avoid investing more than \$100,000 in any one institution.

Excess funds whether deposited in a checking account or invested are maintained for various reasons by nonprofits. These are sometimes called rainy day funds and organizations use this money to withstand a recession, loss of members or other unexpected financial loss. The goal is to build a rainy-day fund equal to 50% - 100% of the expense budget.

12. **Auditing.** This is a best practice.

As a matter of sound business practice, a periodic accounting audit of the branch is recommended. Please check with a local CPA regarding state requirements and the frequency of auditing for your specific branch.

VII. Branch Compliance

ASALH National expects that branches will comply with all stated requirements.

A. Operating Compliance Requirements

Assuming all outstanding chartered branch activation requirements are met, a branch is considered compliant and in “good standing” when it satisfies the 12 operating requirements identified in the table below.

A branch must be in good standing to qualify for any type of branch recognition.

Table 13: Compliance Requirements

1. Submit complete, timely and accurate annual reports for prior year activities: a) Annual Programmatic Report by January 15 and 2) Annual financial Report by March 31
2. Maintain a minimum of fifteen (15) branch members, including at least one (1) institutional member, whose dues are current.
3. Elect at least five (5) branch officers per the Branch Constitution & Bylaws, whose dues are current as of January 1 when elective terms begin.
4. Submit donation by August 31; \$600 is highly recommended as the annual minimum.
5. In February each year, hold a public event to recognize Black History Month.
6. In September each year, hold a public event to recognize Founder’s Day, on or around the official founding of ASALH on September 9.
7. In December each year, hold a public event to recognize Founder Woodson’s birthday, on or around his official birthdate of December 19.
8. Send a minimum of one representative to the Annual Meeting and Conference at least once every three (3) years, who must attend the branch workshop conducted during the conference.
9. Ensure applicable representation on scheduled monthly branch calls.
10. Create and implement a formal membership drive that that runs from October - February each year.
11. Recruit new members to maintain required branch membership level and grow membership.
12. Display the Branch Logo correctly, consistently, and prominently at branch events.

B. Non-Compliance

The table below identifies the three compliance categories in which a branch may fall and what constitutes non-compliance.

Table 14: Compliance Categories

Branch in good standing	<ul style="list-style-type: none">• No deficiencies.• Meets requirements #1-12.
Minor non-compliance	<ul style="list-style-type: none">• Minor deficiencies in meeting objective measures for the requirement or in the quality or timeliness of the information.• For requirements #11-12.
Major non-compliance	<ul style="list-style-type: none">• Major deficiencies in meeting objective measures for the requirement or in the quality or timeliness of the information.• For requirements #1-10 or any combination with #11-12.

C. Corrective Process

A branch not in compliance with requirements will have the opportunity to take corrective action to come into compliance.

1. The VPM will advise the Branch President when expectations were not met for any of the requirements listed above, specify the requirement(s) that were not met and give the branch an opportunity to cure the deficiency. The VPM likewise will determine if the branch needs support, such as, a tutorial and arrange for the needed support, as possible.
2. The MC will concurrently alert the EC to the deficiency.
3. The VPM and Branch President will agree on a timeline by which to correct the deficiency, and the VPM will clearly communicate the consequences for not complying.
4. If the branch cures the deficiency by the revised due date, it will become compliant. However, it will not be eligible for branch recognition that year.
5. Should the branch fail to timely cure the deficiency after being given an opportunity, the MC will again advise the EC, at which time it may recommend sanctioning the branch.
6. The Branch President will be notified of any impending adverse action.
7. The sanction will depend on the number and type of deficiency and the history of compliance.
8. Sanctions can run a range of options (from a warning, probation, withdrawal of branch privileges—removal from the branch directory or loss of branch charter for an extreme case of persistent non-compliance).

VIII Dissolution and Rechartering of Branch

A. Dissolution of Branch

The Executive Council may effect the dissolution of a chartered branch that is unable to meet the requirements of its charter on an ongoing basis. Branch presidents are advised to seek help through the Vice President for Membership as soon as they begin to experience difficulty.

Possible causes for a dissolution include:

1. A branch on probation is not able to correct deficiencies.
2. A branch becomes totally inactive with no communication despite repeated efforts by ASALH to make contact.
3. The officers of a branch indicate inability to carry-out the requirements of the charter for the foreseeable future.

In the event that the Executive Council effects a dissolution:

1. An officer of the branch must be designated to work with ASALH to close operations.
2. A letter will be sent by ASALH National to the Branch President with a copy to the Treasurer and Secretary of the action to dissolve the branch. They must provide evidence of receipt, which will be retained with the records of the dissolved branch.
3. Any remaining funds, after paying outstanding expenses, must be transferred to ASALH National.
4. The branch will be removed from the website, lists and database of branches.
5. The branch's website will be archived.
6. Active members of the dissolved branch will have the opportunity to join another branch of their choice.

See **Appendix 10: Dissolution or Closing of a Branch** for how a branch should initiate its own closure.

B. Rechartering of Branch

A dissolved branch has the opportunity to reorganize to regain its charter. A rechartered branch must have the same name and mission as the predecessor branch. A dissolved branch may apply for reinstatement by demonstrating that the circumstances that caused its dissolution are corrected, it can meet requirements going forward and it satisfies the conditions for chartering.

The process to recharter a branch starts as a formal request and is summarized as follows:

- By May 1, submit the **Request for Branch Rechartering** shown as Appendix 11.
- The MC will review the request and based on merit, present it to the EC for approval at its June meeting.
- The branch will be notified by the VPM within forty-eight (48) hours of the EC decision.
- An organizing committee may be created to recharter the branch, functioning in the same capacity as for the organizing branch.
- Elected officers in place at the time a branch was dissolved may not **run for office for at least three (3) years after the branch is rechartered.**
- The branch will need to go through the chartered branch activation process.
- The charter will bear the original charter branch identification number.
- The new charter will bear both the original charter date and the recharter date.

A rechartered branch will have all the benefits and requirements attendant to a chartered branch.

IX. Branch Recognition

Evaluation Tool for Branch Awards

X. Membership

The guiding principle on membership for branches is that ASALH will continue to grow total membership focusing on both recruitment and retention strategies to solidify its position as the organization to continue the Woodson legacy.

A. Definition of Membership

An ASALH National member is an individual or organization that believes in its mission and pays dues to support that mission. Members may belong to a branch or be at-large (non-branch).

A branch member is first an active/current member of ASALH who joins the branch based on criteria established for local membership.

B. Member Value Proposition

A member joins ASALH and the branch based on some promised or perceived value to be delivered. It is the primary reason an individual joins and stays with an organization.

For ASALH, the member value proposition is a global platform for scholarship, promoting African American history and advocating for its recognition as American history. The value proposition for the branch is essentially the same but the community aspect of a branch adds to that value.

When a member's experience does not match expectations, the membership will not be renewed.

C. Member Benefits

1. Benefits of ASALH National Membership

Member benefits linked to dues payment are shown at <https://asalh.org/members/join/>. In addition, members enjoy their individual contributions, whether it be adding to the body of scholarly works on African American history, serving on the Executive Council/Committee or volunteering in some other capacity.

2. Benefits of Branch Membership

In addition to the ASALH benefits listed above, branch members enjoy greater engagement with their community and opportunities to:

- a. Develop leadership, managerial, public speaking and group decision making skills by serving as a branch officer.
- b. Obtain exposure and opportunities based on branch volunteer experience to be considered for elective service on the Executive Council¹².
- c. Build recognition for ASALH/ branch as the voice of the community on African American issues.
- d. Educate people about African American history and life in their community.
- e. Help to perpetuate the Branch by volunteering for work that needs to be done.
- f. Help to grow ASALH membership through branch member recruitment and engagement.
- g. Network with other branch members to develop relationships or even friendships.

D. Importance of Branch Membership

Branches were conceived as an integral part of the ASALH structure to deliver on the mission through sustained membership.

Research shows that members who belong to local affiliates of national associations generally have a higher level of engagement with their association and its mission than at-large members. It is also well established in the association world that there is a strong relationship between member engagement and member retention. Combined, these two factors show the importance of branch members to ASALH's growth and long-term viability.

One reason for the higher engagement at local affiliates may be the local nature of community, which allows members to have a more personal interaction, engagement, and volunteer opportunities. Some branch members may even value branch peer networking as their primary reason for belonging to ASALH. These are aspects of branch membership that can be used to appeal to prospective members.

¹² When ASALH's Nominating Committee is ready to seek nominations for the Executive Council and Executive Officers, it will issue a call for nominations identifying the open positions, eligibility criteria and submission requirements and it will also post the information at <https://asalh.org/members/executive-council-member-selection/>

E. Growing Membership

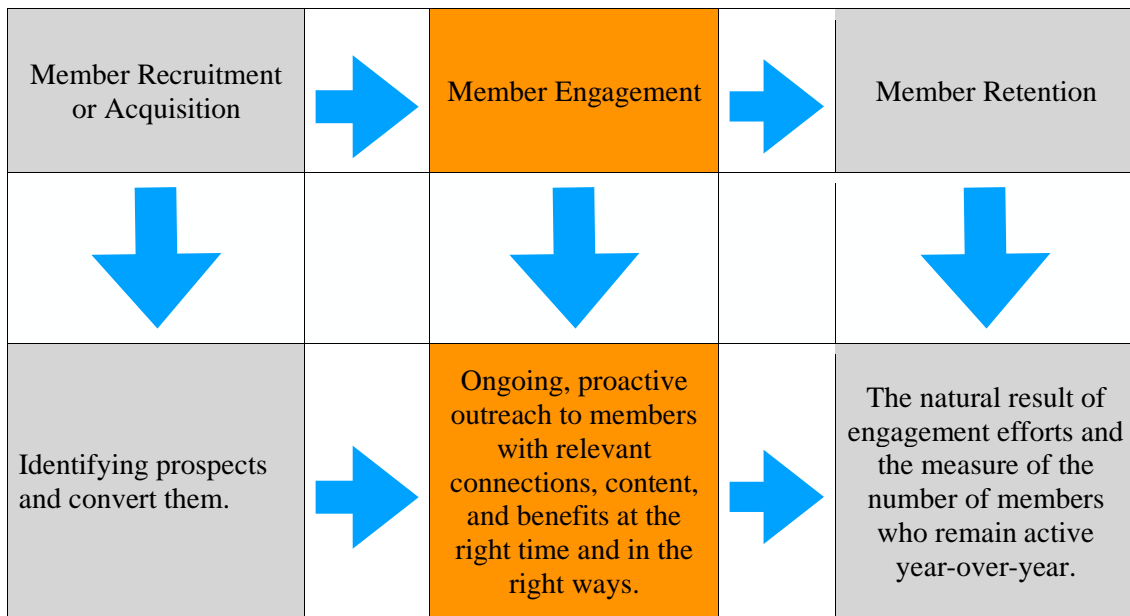
Membership is the most direct and tangible way to support ASALH’s mission. Overall organizational health improves as membership grows to support programs, share volunteer work and donate. The ideal way to grow membership is to simultaneously renew current members (through engagement) and recruit new ones. However, we know that retention of existing members is a challenge, which puts pressure on recruiting new members. Even to maintain the required membership level of 15, branches must continuously acquire members because of inevitable attrition each year.

1. Membership Growth Strategy

Branches can increase membership by developing and executing a growth strategy. The strategy can be tied to an overarching plan that ASALH may develop, or a branch can develop its own. A membership growth strategy is generally a long-term plan executed over a number of years because it takes time to identify, recruit and engage members.

Three inter-related elements to growing membership are shown in the figure, below.

Figure 7: Elements of Membership Growth



The framework for developing a strategy for any of the elements shown would have these primary components:

- a. An overall Goal
- b. Objectives to support the goal that are measurable
- c. Activities/tactics to support objectives with specific timelines, which may include marketing
- d. Goal status (a check to determine progress on meeting the goal)
- e. Objectives status (a check to determine progress on meeting the objectives)
- f. Activities status (a check to determine progress on the activities)
- g. Results
- h. Year-end evaluation of strategy and recommended adjustments for the next cycle

2. Recruitment Strategy

Membership strategies in general must be developed, revisited, and tweaked over time as the needs and expectations of members are always changing. One important recruitment consideration is the need to understand exactly who the ASALH member is, as to know who good prospects are, how to communicate ASALH's mission, and how to persuasively convey the value proposition of branch membership. It is also helpful to develop a budget and determine what funds are available to support the priority items that emerge from the strategy.

Although no market research data are available to create branch member personas, by observation, they generally are passionate purveyors of African American history, admirers of Dr. Carter Woodson, and individuals who find meaning in helping to carry on the Woodson legacy. At the same time, many branch members self-identify as retired and growing older, and they have expressed a dire need to recruit younger members who can assume the role as guardians of this legacy.

Even with this limited context, it is possible to develop a useful recruitment strategy that will have everyone working toward the same outcomes from a common set of assumptions. A recruitment strategy template is provided below.

The output of a membership recruitment strategy may look as follows:

Table 15: Illustrative Membership Recruitment Strategy

Goal (multi-year)	Elevate the impact of ASALH and improve member services with an expanded base of members to serve in volunteer roles.
Objectives	Tactics
1. Leverage family members and the presence of institutions in the community to recruit members to the branch.	<ol style="list-style-type: none"> By January 30. Document what the branch needs from members, the population that can meet those needs and who among that population should be targeted. By May 31. Gauge interest to identify 20 prospects who would be a good fit from: <ul style="list-style-type: none"> Registered attendees at the branch's public events. Former branch members Professors and students at nearby colleges, with the understanding that student membership has a high turnover rate. Among targeted family members, ASALH's at-large members and such groups as: local business owners, churches, and other institutions. By December 31. Convert 10% of the 20 prospective members. (Conversion of a prospect can extend over many years but valuing the prospect's ideas and gaining their trust is important): <ul style="list-style-type: none"> Make the ask of prospects to get a definitive yes, no, maybe or not ready. Revisit prospects, with due diligence paid to ensure that converted prospects and individuals who are a definite "no" do not continue to be contacted. Get to know your prospect, through conversations, social media, etc., to better engage. Nurture prospects with information or invitations to public events of special interest to them, with no strings attached.
2. Build recognition for the ASALH brand	<ol style="list-style-type: none"> May 1- September 30. Set up a table at 6 free community events and farmers markets with the Journal and other branded material displayed to initiate conversation. January 1- December 31. Leverage the three (3) public events to promote the brand using at least one media platform for each event: website, social media, newsletters, and bulletin board. January 1- December 31. Take advantage of public service announcements (PSAs) offered by radio and TV stations to publicize the branch's mission and events at least one (1) time. January 1- December 31. Engage at least 5 people with diverse back-grounds, perspectives and life experiences in a discussion about Dr. Woodson. <p>January 1- December 31. Use branch logo for official business.</p>
Goal Status at 6/30	No Change
Objectives Status at 6/30	No change
Activities Status at June 30	Objective 1: Revise projected number of prospects converted to 5% from 10% Objective 2: Revise projected use of 1 media platform to 2 for Woodson's birthday.
Results	<ol style="list-style-type: none"> The branch is aligned with ASALH National on the need for an annual membership drive. The branch exceeded the minimum membership level with 16 members and increased institutional membership to 2.
<p>Evaluate goal and overall process and make tweaks.</p> <ul style="list-style-type: none"> Set objectives for the next year in this multi-year strategy. One objective may focus on young members with programs for young members as a prime tactic. 	

3. Engagement Strategy

A strategy like the one for recruitment can be developed for member engagement. Consider engagement the centerpiece of membership renewal model and an indicator of how well the branch is delivering on the member value proposition. Membership renewal rates are always below 100% because of attrition for normal reasons. However, a low renewal rate should be a concern, and there should be an examination of possible underlying causes: did members get reminders to renew, was website performance an issue or did the member not have a sense of belonging? Each of the contributing factors would need to be corrected.

One important tool for managing renewal/engagement is a membership database that can help determine who have not renewed their membership and who have been active (attend events, votes and receive communications). This can tell who may need to receive an outreach.

Another key to successful engagement is understanding the general makeup of the membership and what it is enthusiastic about, so that activities can be tailored to those interests.

In general, branch officers need to develop a member centric mindset to ensure that members feel acknowledged and valued, have the needed education about their role and feel that communication is adequate. Some of the tactics to consider in an engagement strategy include:

- a. Provide a personal welcome to each new member.
- b. Maintain high contact during the first three years to answer questions. This contact gradually tapers after the first year but devise subsequent 6-and 12-month check-ins because the renewal rate in the first three years is lower than for other cohorts.
- c. Get to know members, and at their own pace.
- d. Publicly recognize members for a job well done to let them know that they are personally valued.
- e. Celebrate and thank them for their membership each year.
- f. Inquire from members if they are realizing the value they expected from the branch and how their experience can be improved.
- g. Determine if any lack of engagement is due to the branch or an external cause, and once determined, find a way to resolve the problem or support the member.
- h. Invite active participation in the work of the branch that best suits skills and interest—as an officer, on a committee or with an event.
- i. Maintain a feedback loop to receive suggestions and reactions to events and other engagement activities and be open to making changes.
- j. Foster belonging with theme items, such as, t-shirts or items from the ASALH store for social or special events.
- k. Make time for fun with social events.

Engaging members is a continuous process, which takes consistent effort to deliver ongoing value to members that matches their expectations. Members who stay involved with the branches are generally more satisfied and want to continue as a member.

4. Engaging Younger Demographic

There is a huge generational difference at play in recruiting and engaging younger members. Branches have stated that Gen X and younger are severely underrepresented among their members, like the experience of many associations today. The generational differences is evident in processes for engaging, learning, communicating, decision making and building community.

Branches will require a different engagement model from those of previous generations, for example, social media, to bridge the gap. This is a necessary investment to attract young members. In general, opportunities to engage a young population include:

- a. Modernized content, which is minimalist, designed with graphics and delivered digitally.
- b. Video participation where practicable, even after covid.
- c. Information delivered in the-moment.
- d. Information delivered in bite-sized pieces.
- e. Information delivered on media that young people engage with.
- f. Strategies that focus on purpose, relevance and outcomes.
- g. Time management including micro-volunteering (short projects and short commitment of time).

5. Retention/Renewal of Membership

Retention is the outcome of successful engagement and a member experience closely aligned to expectations. High retention is the prime objective as it brings stability, builds membership, maintains a team of experienced branch members and reduces dependence on recruiting new members.

The cost of recruiting a new member is estimated to be five (5) times the cost of retaining existing members because of the investment of time, effort and in some cases marketing cost needed to build a relationship, even when there is no certainty that the prospect will become a member. This makes another case for retention.

A high retention rate signals member satisfaction and that the branch is doing the right things and a low retention rate signals that the branch needs to work more on engaging members.

F. Branch Membership Dues

At its discretion, a chartered branch may charge annual local dues. The branch collects its own dues and the income is retained at the local level. Ability of members to pay and the amount needed to financially support branch programs are key considerations in setting the dues amount.

Current membership in ASALH is a prerequisite for branch membership. Members may join or renew their ASALH or branch membership at this link <https://asalh.org/brand/> on ASALH's landing page.

When branches register members and collect dues, they must use the approved membership form located at <https://asalh.org/wp-content/uploads/2021/11/2022-NATIONAL-MEMBERSHIP-FORM-FOR-BRANCH-MEMBERS.pdf>

ASALH maintains a membership directory for each branch and supports branches in keeping their directory current. However, ASALH relies on updates from the branches to maintain its database as it does not collect branch dues nor place individuals in branches. Branches should submit new member information to reconcile the databases to membership@asalh.org.

The branch directory reconciliation process calls for:

1. ASALH to send each branch a directory of their members every month.
2. Upon receipt, the branch officer with responsibility for membership should confirm the information to complete the process. To confirm the data, ensure that the list contains the name and contact information for each branch member: - mailing address for mailing the complimentary issues of the JAAH; email address for invitations to meetings, general ASALH updates, and importantly, ballots for upcoming election(s); and phone numbers.
3. The branch must promptly report omissions or errors to ASALH.

G. Terminated Membership

A terminated membership is defined as a member who resigns or dues that have expired for at least one (1) day. A terminated member will cease to receive **all** membership benefits.

If an individual's membership in the National Association has expired, that individual's membership cannot be counted toward the requirement for the 15-member branch minimum. Branches should keep a list of expired members and continue to encourage them to reengage and renew their membership.

H. Reinstatement of Terminated Membership

A terminated membership may be reinstated at any time with the payment of annual dues.

I. Member Code of Conduct

ASALH has adopted a [*Membership Code of Conduct*](#) that specifies a standard of behavior that members must adhere to by acting honestly and responsibly in all their interactions. Members who knowingly violate any provision of the Code of Conduct may be subject to having their membership terminated.

Branch Officers must in addition avoid conflicts of interest where their personal interest and the interest of ASALH and/or branch are in conflict. A **Conflict of Interest Policy** for officers is incorporated into the Model Constitution and Bylaws.

Procedures for regulating and adjudicating violations are included.

APPENDICES

Appendix 1

Application to Form an ASALH Branch

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

Application to Form an ASALH Branch

Submit by September 1

Thank you for your interest in organizing a Branch of the Association for the Study of American Life and History (ASALH). We are delighted with the interest of your group.

Any ASALH member in good standing (current in dues) may complete an application to form a branch.

September 1 is the deadline to apply and the application is valid for only one cycle.

If the applicant fails to respond to inquiries from ASALH or if the application is not approved by the Membership Committee or Executive Council, it will expire on November 30. To receive further consideration, the applicant will need to address any identified deficiencies and resubmit the application by September 1 of the following year.

To understand the requirements for the phase following approval of your application, refer to the Organize a Branch Phase of the **Branch Procedural Manual** prior to submitting your application.

Please contact the Vice President for Membership at VPformembership@ASALH.org if you have questions. Download this form [here](#).

Branch application questions

A. Proposed Name of Branch

The naming convention is in the format of **ASALH Organizing XYZ Branch**. Indicate if the branch is being named in honor of a symbolic/iconic figure, and identify that person and contribution made to warrant such honor. Living individuals cannot receive such honor.

B. Area that the Branch will Serve

Define the geographic area and community that the branch will serve.

C. Population

1. What is the African American population of the proposed service area?
2. What is the total population of the proposed service area?

D. Members Interested in Forming a Branch

List the members who will be working together to create the branch along with their contact information and affiliations. A minimum of 8 members in good standing is required as an Organizing Branch.

Name	Email	Phone #	Affiliation
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E. Community Interest

Are there any community and/or institutional organizations interested in supporting and/or engaging with the proposed branch? Please explain.

F. Membership

Briefly describe how you will ensure that the membership level does not fall below 8 members as an Organizing Branch.

G. Leadership Roles

Are there at least three (3) of the interested members listed above who are committed to assuming leadership roles on an organizing committee to advance the branch to charter status?

H. Additional Information

Provide any additional information you believe would be helpful to our initial review of your application.

Your Information

Name: _____

Phone #: _____ .

Address: _____

Email address: _____

Signature: _____

Submit completed form to the Vice President for Membership at VPformembership@asalh.org

Appendix 2

ASALH XYZ Organizing Branch Agreement

ASSOCIATION FOR THE STUDY OF
AFRICAN AMERICAN LIFE AND HISTORY

Organizing Branch Agreement _____(date)
REVISED

As organizing entity of the Association for the Study of African American Life and History, Inc. (ASALH), the undersigned agrees to follow all policies and procedures, and all modifications and/or revisions hereafter set forth by the National Headquarters of ASALH.

Organizing Branches of the Association shall be under the jurisdiction of the Association and subject to all of its rules and regulations as established in the ASALH Constitution and By Laws. This includes adherence to all requirements noted in the **Branch Procedural Manual** as well as documentation and financial accounting procedures. The undersigned further acknowledges that revisions to any of the Association's official documents, forms, and/or procedures are strictly prohibited and are the sole responsibility of the national headquarters.

All organizing branch officers are responsible for representing and upholding the mission and vision of the National Association and for ensuring that all such policies and procedures are conveyed to the membership of the said local branch.

The Association reserves the right to amend this agreement for the benefit of the Association, its branches and membership.

National Vice President for Membership

Executive Director

Branch President (Signature)

Sign and copy this form for local branch records.

Branch President (Print)

Forward original signed document to:
Sylvia Cyrus
Executive Director c/o ASALH
301 Rhode Island Ave, NS, Suite 2204
Washington , DC 20001

Official Branch Name

Date _____

Branch Secretary (Signature)

Branch Secretary (Print)

Date _____

Appendix 3

Model Branch Constitution & Bylaws

**ASSOCIATION FOR THE STUDY OF
AFRICAN AMERICAN LIFE AND HISTORY**

Constitution and Bylaws of the ASALH XYZ (Organizing) Branch

Constitution

ARTICLE I. NAME, ADDRESS AND AFFILIATION

Section 1. NAME: The name of this organization shall be the ASALH XYZ (Organizing) Branch (Branch).*

Section 2. ADDRESS: The Branch shall maintain an official mailing address at a location selected by the Branch President and approved by the membership. The current location of the Branch office is (full address of branch office).

Section 3. AFFILIATION: The Branch is a direct affiliate of ASALH, subject to its governance, requirements of the (Organizing/Chartered) Branch Agreement, its business and financial procedures and this Constitution and Bylaws that it has approved.

ARTICLE II. BUSINESS YEAR

The business year starts on January 1 and ends on December 31.

ARTICLE III. PURPOSE

As an ASALH affiliate, this Branch is established solely for educational and research purposes, consistent with the tax-exempt purpose of ASALH under 501 (c) 3 of the Internal Revenue Code.

ARTICLE IV GOVERNANCE AND STRUCTURE

Section 1. GOVERNANCE: The Branch shall elect Branch Officers to manage the affairs of the Branch in accordance with its governing documents including Charter, Constitution and Bylaws and other guidance that may emanate from ASALH or this branch.

Section 2. STRUCTURE: The branch governance structure is as follows:

- Membership
- ASALH Executive Council
- ASALH Membership Committee
- Elected Officers
- Standing Committees

*Upon chartering “Organizing” will be removed from the name of the Branch.

ARTICLE IV: MEMBERSHIP ELIGIBILITY, GOVERNANCE ROLE, TERMINATION AND TRANSFERABILITY

Section 1. **MEMBERSHIP ELIGIBILITY:** A current member of ASALH is eligible for branch membership subject to the criteria established by the Branch. Membership is granted only after all criteria are met.

Section 2 **ROLE IN GOVERNANCE:** Membership votes are required to elect officers and initiate their removal, fill vacancies, approve and amend governing documents, dissolve the branch, set or change dues amount and receive branch reports.

Section 3 **TERMINATION OF MEMBERSHIP:** Members shall remain in good standing when current in applicable dues and while in conformance with the Membership Code of Conduct. Membership can be involuntary terminated for non-payment of dues 24 hours after the due date or for behavior unbecoming to a member.

Section 4. **TRANSFERABILITY:** Membership in the Branch is not transferable.

ARTICLE V BRANCH OFFICERS, QUALIFICATIONS, ELECTIONS, TERMS, VACANCIES AND REMOVAL

Section 1. **OFFICERS:** Branch officers shall at a minimum consist of a President, Vice-President, Secretary, Treasurer and Historian. Other officers may be added as needed.

Officers shall be responsible and accountable for the operations of the branch.

Officers are volunteers, without compensation.

Section 2. QUALIFICATIONS

- a) The President ideally should be deeply invested in the mission of ASALH, has a history with the Association and the Branch and has the confidence of Branch members.
- b) The Vice President shall demonstrate the same qualifications as the President. In the event that the office of the President becomes vacant, the Vice President shall assume the position of the President for the remainder of the term.
- c) The Secretary should have excellent verbal and written communications skills, be detailed oriented with the ability to organize and prioritize work.
- d) The Treasurer should be a person of great trust and integrity with an aptitude for accounting and a strategic understanding of the organization in its totality.
- e) The Historian should have good communication, technology and organizational skills with a deep understanding and appreciation for the mission of ASALH.

Section 3. ELECTION: Officers shall be elected by the members at the annual meeting of the membership from a proposed slate of candidates. Elected Officer shall begin their term of service on January 1 following their election and shall hold office until a successor is elected and takes office. Elected officers must be members in good standing and remain in that status throughout their term in office. **No member shall be eligible for office who has not been a member of the Branch for at least one (1) year.**

Section 4. TERMS OF OFFICERS: Officers shall be elected in rotation or staggered terms. The term of office shall not exceed 3 years for the President and Treasurer and two years for the Vice President, Secretary and Historian. Each officer may serve in the same position for consecutive terms, not exceeding a total of six (6) years. Past officers may be elected again after a one-year (1-year) break.

Section 5. VACANCIES: If for any reason the office of the Vice President, Secretary, Treasurer or Historian becomes vacant, the President shall nominate a member with the requisite qualifications to serve out the remainder of the vacated term. The nomination shall be submitted to the membership for approval by a majority of the members who vote.

Section 6. REMOVAL OF ELECTED OFFICERS FROM OFFICE: Elected officers may be removed from office for conduct incompatible with the Membership Code of Conduct, violation of the Conflict-of-Interest Policy and repeated failure to perform the duties and responsibilities of the office thereby causing damage to the reputation of ASALH or the branch.

ARTICLE VI: BANK ACCOUNT

Each chartered branch shall establish a bank account to conduct financial business. The application to establish the account must be signed by the Secretary. The signatories on the bank account shall be the President and the Treasurer, who shall be unrelated parties. Payments equal to \$2,500 or more shall require two signatures.

ARTICLE VII: CONDUCT OF MEMBER AND OFFICER

No part of the income of the Branch shall benefit any member or officer of the Branch, or any private individual (except that reasonable compensation may be paid for services provided to or for the Branch). No member or officer of the Branch or any private individual shall be entitled to share in the distribution of any of the assets on dissolution of the Branch.

ARTICLE VIII - AMENDMENTS

These Constitution and Bylaws may be amended by a majority vote of the membership at any branch meeting, provided due notice has been given to the membership of the proposed changes. Notwithstanding Branch approval, no amendment shall be effective unless and until approved by ASALH. Any motion to amend the Constitution and Bylaws shall clearly state such.

ARTICLE IX - DISSOLUTION

In the event of dissolution, all of the remaining assets and property of the Branch shall, after payment of outstanding expenses, be turned over to ASALH National.

Bylaws

1. OBJECTIVES OF THE BRANCH

The specific objectives of the ASALH XYZ (Organizing) Branch are to:

- Support ASALH National's programs and events in local communities.
- Grow branch membership to support the Branch and increase ASALH's membership.
- Help branch members realize the value they expected when they joined the branch.
- Support ASALH's operations with financial contributions.
- Attend the National Convention and Meeting to increase knowledge and network.

II. MEMBERSHIP

[IF APPLICABLE] **Annual Branch Dues:** The dues amount shall be a fixed dollar value each year, unless and until changed by a majority vote of the members at an annual meeting.

Members must pay their dues by the first day of the business year, January 1 to maintain privileges. Any member whose local dues are not current by March 1 will be deemed inactive. That member will be considered a non-voting attendee at branch meetings.

The secretary shall be authorized to send notices to all members whose dues are delinquent.

III. MEETINGS

Proceedings: "Robert's Rules of Order (newly revised)" shall be used as the authority for the function and management of meetings to the extent to which they are consistent with the other governing documents of the Branch.

Parliamentarian: The Branch President must appoint a parliamentarian, who shall serve at the pleasure of the President, to help in exercising the proper procedure for the conduct of meetings.

Order of Business: The order of business as established by the meeting agenda shall be [template]:

1. Call to order by the presiding officer
2. Approval of the Agenda
3. Reading of the minutes of the previous meeting (followed by corrections and vote of acceptance by members)
4. Agenda item(s) needing a vote
5. Treasurer's report (vote of acceptance by members)
6. Committee reports (vote of acceptance by members)
7. Unfinished business
8. New business
9. Reading of incoming and outgoing correspondences
10. Recognition of benevolence, etc.
11. Adjournment

Regular Branch Meetings: Regular meetings of the members shall be held a minimum of (4) times per year [pick a number] on (a fixed cycle, i.e., the third Friday of the first month each quarter). A meeting must be held in January at the start of the business year and the annual meeting in [pick a month, preferably in the fall].

At the annual meeting, in addition to its regular order of business, members shall elect officers and determine the direction of the Branch for the coming year.

Special Branch Meeting: Unique circumstances or needs may require that a meeting be called by the President. A petition signed by five (5) active members may also call a special meeting.

Notice of Meetings: Written notice of each meeting along with an agenda, shall be given to each voting member at least ten (10) days prior to the meeting. The agenda may be amended at the meeting with the consent of the members attending.

[NOTE: Check your state law to see if greater notice is required for member meetings.]

Quorum: A quorum to legally transact business shall be one-third (1/3) of the active membership including at least two of the following elected officers (President, Vice President, Secretary, Treasurer).

Decisions on Votes: All issues to be voted on shall be decided by a simple majority of those present at the meeting in which the vote takes place.

Only active members of ASALH and the Branch (dues must be current) shall be eligible to vote.

Meeting Parameters

Meetings should not exceed [X # of] hours, unless special business prevails and an extended meeting is approved by the President.

Meetings may be held in person or via electronic media which includes but is not limited to teleconference and Zoom or equivalent, provided that all participants can communicate effectively.

Record of Meetings: Provide accurate, complete, concise minutes that document Branch deliberations and decisions. They should contain the following:

- Names of members who are present and who are absent
- The date, time the meeting begins and ends
- A concise summary of actions taken
- The names of the members making and seconding motions
- A summary of discussion points, including brief statements of the issues raised and concerns reflected during the discussion
- A summary of key action items, future steps and who will take them.
- The name and title of the person taking the minutes

IV. ELECTED OFFICERS

Authority and Duties: The five Elected Branch Officers shall manage, control and account for the assets and business of the branch.

Branch Officers have a duty to understand what each provision of the Constitution and Bylaws means and an obligation to follow them.

Responsibilities:

- Comply with ASALH requirements for a branch in good standing, for example, submission of annual reports.
- Hold effective meetings, at least four (4) annually.
- Elevate the Branch's visibility in the community.
- Help to recruit candidates with requisite skills for branch elections.
- Provide proper oversight of operations, including financial oversight.
- Orient new members to the Branch.
- Orient newly elected officers to their roles.
- Keep members engaged so they stay interested in the branch.
- Ensure ethical integrity among this peer group and remove ineffectual Officers or Officers who have violated terms of conduct.
- With membership approval, appoint replacement Branch Officers.

Duties of Officers:

President - The President shall preside at all business meetings, ensures that all rules and regulations are observed, ensures submission of accurate and timely annual reports, appoints and serves as an ex-officio member of all committees, hold other Branch Officers accountable for performance of their duties, initiate strategies, be the official representative of the Branch except when otherwise designated. The President's duties also include the signing of legal and financial documents and preparing meeting agendas.

Vice-President - The Vice-President shall perform the duties of the president in his/her absence. In the absence of elected officers for membership and programs, the Vice President shall have responsibility for membership and programs and chair those committees.

Secretary - The Secretary shall custody official Branch records, prepare official minutes of all meetings, provide required notices of meetings to members. This Officer also provides the National Office with all official reports requested of the Branch. The Secretary shall ensure that certain documents are available for reference at all meetings of the Branch, which are identified here <https://asalh.org/wp-content/uploads/2020/01/DOCUMENTS-YOU-SHOULD-HAVE-AVAILABLE-AT-EACH-BRANCH-MEETING.pdf> The role is also responsible for establishing a records management system for non-financial branch records.

Treasurer - The Treasurer shall be responsible for all financial transactions and custody of financial documents. This Officer shall deposit monies received in a branch bank account approved by ASALH and pay all bills signed by the President. The Treasurer shall keep an accurate record of all monies deposited and spent and shall make a financial report at each branch meeting. This Officer shall be a member of the standing Budget and Finance Committee but not its chair. This role is also responsible for establishing a records management system for financial records.

Historian - The Historian shall contribute to the history of the Branch with a yearly record of activities and accomplishments. This officer shall collect items, such as, news clippings and pictures about the Branch and its members and shall organize a digital scrapbook to tell the Branch story for the year. The Historian shall chair any standing or ad hoc Historical Committee.

Orientation of Officers - Incumbent Officers shall conduct a robust orientation for incoming Officers prior to January 1 to transfer knowledge and transition roles. It would be helpful to prepare an orientation binder with the information and documents that will be discussed. Topics to cover from the Branch perspective shall include at least:

- Branch Charter
- Constitution and Bylaws
- Written list of branch records
- Access to manual and electronic branch records, such as, location, passwords and account numbers
- Responsibilities of the positions
- Timetable for completing required annual duties
- Unfinished projects
- Important contacts and resources
- Potential pitfalls to avoid; and
- General advice based on experience with the position, members and community

Removal of Elected Officer - Any Officer may be removed with cause, upon an affirmative vote of two-thirds (2/3) of the membership. The termination action may be initiated by a fellow Officer or the membership with the signatures of a minimum of 10 members in good standing.

Complaints shall be reviewed by a three-member body appointed from among the Elected Officers by the President and presided over by the President, unless the complaint is against the President, in which case, the Vice President shall make the appointments and preside.

- The request for removal must not be personal. It must be explicit in the charges leveled, identify the specific breach and the damage caused. There must be corroborating evidence. The complaint should be sufficiently confirmed to allow the review body to reach a decision.
- The Officer shall be entitled to a due process hearing prior to any termination action being taken, including notification of complaint and any evidence provided.
- If the evidence is insufficient to reach a conclusion, the complaint will be closed. However, if the evidence warrants an action, the response taken can be scaled in severity based on the written findings and recommendations. The most severe outcome is that the

elected officer is removed from office, with cause, upon an affirmative vote of the membership.

An officer who is removed from office will not be eligible for future office in any branch?

V ELECTION OF OFFICERS

Elections - Branches must hold elections for officers with expiring terms. This means at an annual meeting preferably in the fall, but within sufficient time to allow for an ASALH led orientation and a smooth transition by January 1. Only active members in ASALH and the branch are eligible to vote. Candidates for office as well as elected officers are allowed to vote.

Nominations - A call for nominations to the membership shall be made no less than thirty (30) days prior to voting for officers to fill expiring terms. Either the Branch President or an Ad Hoc Nominating Committee appointed by the President will pursue candidates via available methods including posting on the Branch website. The resulting slate of candidates shall be presented to the members no less than 10 days prior to the election at the Annual Meeting.

If call for nominations yields only one interested candidate for an office, that office will be deemed uncontested and the candidate can be declared the winner.

If more than a single candidate expresses interest in an office, a voting by ballot will take place.

Secret Ballots - All officers shall be elected by secret ballots at the Annual Meeting of the Branch. A member may vote once only for each position.

The candidate receiving the highest number of votes will be declared the winner. In the event of a tie, the winner will be determined by drawing a name with the agreement of the candidates.

VI. COMMITTEES

The Branch shall have Standing and Ad Hoc Committees. The President shall be an ex-officio member of all committees.

Standing Committees: There shall be at least three standing committees, whose members shall be appointed by the President. They must be chaired by a Branch Officer. Branches with sufficient resources may add some of the other committees as standing committees.

Other Committees: The President may appoint special purpose Ad Hoc committees, together with their chairpersons, to accomplish the objectives of the Branch.

Standing Committees	Other Committees
Membership	Fundraising
Program	Nominating
Budget and Finance	Constitution and Bylaws
	Historical
	Recognition/Benevolent/Hospitality (Amenities)

Committee Duties:

Membership Committee

1. maintain a database of Branch Members
2. conduct a membership campaign at least once per year
3. develop and implement an orientation program for new members
4. keep members engaged
5. prepare an annual report and submit same to the membership.

Program Committee

1. develop programs/plans for ASALH National events
2. develop programs/plans for local branch events
3. initiate outreach for joint programs with local civic, educational and business organizations
4. design opportunities for fundraising into program plans
5. implement programs

Budget and Finance Committee

1. develop a budget for approval at the annual meeting, for the upcoming business year
2. oversee all fundraising activities in the absence of a Fundraising Committee
3. conduct at a minimum quarterly reviews of the financial records
4. monitor the budget to ensure that revenue and expenditures are aligned and suggest changes to maintain a balanced budget

Fund Raising Committee

1. work with the Budget and Finance Committee to determine an annual development budget
2. tap respective networks for donations of money, time and in-kind support
3. lead Branch efforts that will attract funds needed to support operations

Nominating Committee

1. review the membership list and identify the best candidates for each office based on eligibility requirements and duties of the position
2. ascertain the interest of the potential candidate in serving, through calls/interviews
3. screen and interview candidates
4. identify the candidates to recommend to Branch officers as nominees
5. present a report on the slate of candidates prior to the vote at the Annual Meeting

Constitution and Bylaws Committee

1. receive any bylaws amendments proposed by members
2. recommend to Branch Officers any changes to the bylaws that should result from the committee's deliberations
3. prepare and distribute drafts of revised bylaws to members for review in preparation for a vote for adoption

Historical Committee

1. preserve, collect, research and interpret historical information
2. research places of applicable historic or archaeological value in the Metropolitan Area where the branch is located
3. keep accurate records of the Branch's actions and prepare an annual report

4. cooperate with (specify local area) historical or preservation organizations in conducting surveys and reporting archaeological findings
5. create a history of the Branch (See ASALH's guidance on creating the history of a branch at Link.)

Recognition/Amenities Committee

1. identify outstanding accomplishments by members for recognition
2. keep the Branch apprised of members' illnesses, death, hospitalizations and extend wishes on behalf of the Branch.
3. extend best wishes on a member's birthday, graduation, etc.
4. welcome and receive attendees at programs and affairs of the Branch

Reporting: Each standing committee shall report **at each branch meeting**-and shall make a written report of its activities to be given to the secretary of the Branch.

Limits of Authority: No committee has the authority to obligate the Branch to any activity without a majority vote of the Branch.

ARTICLE VII - CONFLICT OF INTEREST

In the regular course of branch business, officers or members may have the opportunity to advance their own financial or personal interest, against the interest of the Branch and ASALH. Every member and officer is obligated to disclose any known or potential conflicts of interest as soon as they arise. Any officer who engages in a conflict or who fails to disclose a known conflict shall be subject to disciplinary action, including removal from office.

With respect to any actual or possible conflict, if an officer or member has a financial or personal interest in any transaction or arrangement coming before the Branch, the remaining members and officers shall ensure that:

- The interest of such member or officer is fully disclosed to the membership.
- The interested officer or member does not vote or apply pressure on the matter up for vote.
- If after exercising due diligence and looking at alternatives, the undertaking in which an officer or member has a financial or personal interest is approved in a vote by members as being in the best interests of the Branch, it may enter into the transaction or arrangement.
- Payments to the interested officer or member shall be reasonable and shall not exceed fair market value.
- The minutes of meetings where the votes are taken to approve any such transactions shall record the conflict disclosure, vote abstention by the interested party and rationale for approval.

ARTICLE VIII - AMENDMENTS

These Constitution & Bylaws are a roadmap, fairly fixed over time but shall be reviewed annually to assure that branch operations are aligned and it conforms to any changes by ASALH.

When needed, amend as follows:

A. Proposed Amendments

- Proposed changes may originate with Branch Officers or be submitted to them by members or a Constitution and Bylaws Committee.

- Amendments may also originate with ASALH National Governance Committee, which shall review the Model Branch Constitutions and Bylaws on a periodic basis to ensure continued alignment with ASALH’s governing documents, policies and procedures. Any change made will be communicated to branches, which will need to conform their Constitution and Bylaws accordingly.

B. Branch Approval

- Amendments originating with the Branch must first be approved on a provisional basis by the membership, then approved by ASALH and finally ratified by the membership.
- Amendments that originate with ASALH need to be approved, but not ratified.
- Two-thirds (2/3) of the membership must approve or ratify the amendments. Approval must be at an Annual or Special meeting while ratification can occur at a regular meeting, provided that branch members were informed of the proposed changes in accordance with the meeting notice provision of 10 days in advance of the meeting.

C. Get ASALH approval after initial membership approval

- Obtain initial membership approval of proposed changes at the Annual Meeting.
- Submit a mark-up of the proposed changes along with a clean copy to the National Vice President for Governance and Vice President for Membership for review and approval by their respective committees and for further approval by the Executive Committee.
- ASALH returns a signed original document with the amendments (iterative process).
- Schedule a vote to ratify the ASALH approved version at a regular meeting.
- After ratification by the membership, the Branch President signs and dates the original.
- The Branch provides ASALH a PDF copy with both the ASALH and Branch signatures.

The Constitution and Bylaws and all subsequent changes shall be kept securely and indefinitely along with other branch governing documents including, Charter, Organizing Branch Agreement per the Branch’s records management system administered by the Secretary and Treasurer.

ARTICLE IX- RETURN OF RECORDS

If a person ceases to be an officer for whatever reason, it is required that any branch documents that they hold be delivered to or retrieved by the Secretary as soon as practicable.

The ASALH (XYZ) Branch Constitution and Bylaws were:

Approved by the membership on: _____

Ratified by membership on: _____

Appendix 4

Application for Charter Status

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

Application for Charter Status

Submit Application by May 1

This is a request to be considered for chartering by the Executive Council at its June meeting. By signing below, I certify that the Branch has met or commits to meeting the milestones required for chartering as indicated in the checklist below. Download this form [here](#).

STEP ONE:

- **May 1** is the deadline to file this request and meet set requirements.

STEP TWO:

- The application will be presented to the Membership Committee and if approved, to the Executive Council at its June meeting.

STEP THREE:

- Notification of the Executive Council's decision will be communicated within **48** hours by the Vice President for Membership.

STEP FOUR:

- If approved for reinstatement, the branch must go through the charter activation process described in this **Manual** to gain full charter status.

Checklist of Requirements for Chartering

Name of Branch: _____		
Requirement	Requirement Met/Will Be Met [Y or N]	Indicate Submission of Required Documents & Comments
Submit complete, timely and accurate annual reports for Organizing Branch year activities: (1) programmatic report by January 15 (2) financial report by January 31		
Elect at least 5 Branch Officers (President, VP, Secretary, Treasurer & Historian) and submit: Branch Officers Form https://asalh.org/members/branch-directory/branch-officers-and-officers-changes/ Branch President Photo https://asalh.org/members/branch-president-photo-submission/		
Submit the Constitution and Bylaws approved by members.		
Held three (3) public education events: BHM, Founder’s Day & Woodson’s Birthday as an OB.		
Submit a list of 15 current members including at least one (1) institutional member required for a chartered branch.		
Participate on scheduled branch calls with appropriate branch representation and disseminate the information.		
Represent newly chartered branch at Annual Conference and Chartering Ceremony with attendance by the Branch President or another Officer and Historian.		
Secure EIN immediately upon chartering.		
Establish a bank account immediately upon receiving an EIN and provide the first transaction.		
Submit Operating Plan to show how branch will: 1. Execute required three (3) public programs: BHM, Founder’s Day and Woodson’s birthday 2. Engage branch members 3. Recruit new members 4. Contribute at least \$600 to ASALH by August 31.		

President, Organizing Committee: _____

Signature: _____ Date: _____

Submit completed form to the Vice President for Membership at VPformembership@asalh.org

Appendix 5

State EIN and Federal 501 (c) 3 Designation

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

Obtaining a State EIN & 501 (c) 3 Tax Exemption

Employer Identification Number

Every ASALH chartered branch must secure a state Employer Identification Number (**EIN**) **in order** to conduct business in the state, including ASALH's requirement to open a bank account. A branch should utilize its full legal name to apply for an EIN and when conducting business.

To become incorporated, the branch needs to apply to either the Secretary of State or Department of Treasury as states differ as to the agency responsible for this function. The simplest application requires the information listed below but states differ and requirements may slightly vary.

Names of officers, their address & phone numbers:

Business address of Branch (physical address, not a P.O. Box):

Phone numbers:

Constitution & Bylaws

Fee

In all instances, the branch must follow its state's laws and requirements. These documents become part of the permanent record and files of the branch.

501 (C) 3 Tax Exempt Designation

Branch Officers are advised to pursue IRS 501(c)3 tax-exempt status if the Branch intends to seek grants as a revenue source or fundraise \$25,000 or more on a recurring basis.

If a decision is made by a branch to obtain a 501(c)3 designation, which is at the branch's discretion, the branch must complete **Form 1023 Application for Tax-Exempt Status**. The application must be submitted electronically on www.pay.gov and must include the appropriate fee.

The 501(c)3 application is lengthier than the state EIN application but asks for essentially the same information.

Appendix 6

Records Retention Schedule

**ASSOCIATION FOR THE STUDY OF
AFRICAN AMERICAN LIFE AND HISTORY**

Records Retention Schedule

A retention schedule applicable to branches has the following parameters for period of retention, access and disposition.

Type of Record to Retain	Retention Period	Access	Authorization to Destroy
Correspondence documents created inside or received from outside the branch	3 years	Secretary President	Secretary
Meeting documents: Meeting notice, agenda, minutes along with all resolutions, policies and referenced documents	Permanent	Secretary President Vice President	N/A
Constitution & Bylaws	Permanent	All officers	N/A
Legal and governance documents including Organizing Branch, Charter and [Affiliation Agreement]	Permanent	Secretary President	N/A
IRS application for tax-exempt status (Form 1023)	Permanent	Secretary President Treasurer	N/A
IRS determination letter	Permanent	Secretary President Treasurer	N/A
IRS Form 990 tax return	Permanent	Secretary President Treasurer	N/A
Annual Reports to ASALH	Permanent	Secretary President Treasurer Historian	N/A
Accounting records (for all financial transactions)	7 years	President Treasurer	Treasurer
Contracts	7 years after termination	Secretary Treasurer	Treasurer
Bank records (bank statements, electronic funds transfer etc.)	7 years	Secretary Treasurer	Treasurer
Grant application & contract	7 years after expiration	Secretary Treasurer	Treasurer
Donor records & acknowledgement letter	7 years	Secretary Treasurer Historian	Treasurer
Historical documents (primary sources for research and research results)	Permanent	Secretary Historian	Historian
Miscellaneous records, such as, a complaint, review and action	5 years	President Treasurer	Secretary

Appendix 7

History of Branch Template

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

History of ASALH XYZ Branch

As part of a historical society, telling the branch history is important as a matter of record. The branch history can also be a compelling membership recruitment tool.

The history of the branch will be an overview of why and how the branch was formed, background on the founders, key milestones and events that have shaped the branch starting with the founding through the present.

Each branch is unique with special circumstances and its own story to tell. The history should be well researched, comprehensive, informative, easy to follow and visually engaging.

Framework for Branch History

What to Include in Branch History	Example
<p>Name of Branch</p> <p>The name may be linked to the geographic area or may have been inspired by someone or a specific event.</p>	<p>ASALH Grace River Branch</p> <p>The branch was named for the geographic region in which it is located.</p>
<p>Where the Branch was formed</p> <p>Founding Location and Date</p>	<p>Grace River, Oklahoma</p> <p>August 28, 1967</p>
<p>Why the branch was formed</p> <p>This is what the mission is based on</p>	<p>The Branch is an affiliate of ASALH and was formed to help this community develop an understanding and appreciation for the contributions to American history made by African-Americans in this state and throughout the U.S.</p>
<p>How the branch was formed.</p>	<p>The Branch Founding was spurred by Connie Memory, a teacher in the local elementary school, who branch was severely reprimanded for relating stories about the slave trade to her students, even though the material was framed in an age appropriate manner.</p> <p>She influenced the local librarian and a retired nurse to join ASALH and help start the Branch.</p>

<p>An overview of the Founders</p> <p>Provide brief profiles of the founders to show the character of the branch and help define the timetable for the founding.</p>	<p>Profile of Connie Memory, Teacher</p> <p>Profile of Joan Lurner, Librarian</p> <p>Profile James Medic, Nurse (Ret.)</p>
<p>Identify key milestones and events. Including challenges, such as, a branch dissolution and successes, such as, a doubling of membership.</p> <p>Organize a chronology of the people and major events in the life of the branch from inception to date and decide which ones are the most important to include in the history.</p>	<ul style="list-style-type: none"> • March 1, 1965 – Brian Knowles contacted ASALH about forming a branch • June 22, 1966 – Branch was granted organizing status • October 8, 1966 – Organizing Branch held its first membership meeting • August 28, 1967 – Branch is chartered • Milestone • Milestone • Milestone • March 1, 1975 – Realized highest membership level of 35. • Milestone • Milestone • February 15, 2022 – Launched first website for BHM and received nearly 250 visitors.
<p>Written Narrative</p> <p>The result of the above steps is a written narrative of the Branch history.</p>	<p>Example:</p> <p>Warby Parker https://www.warbyparker.com/history</p>
<p>Create a visual</p> <p>Take the written narrative and incorporate applicable images (photos and graphics) and video to turn the branch history into an engaging and powerful visual.</p>	<p>Examples:</p> <p>Special Olympics https://www.specialolympics.org/about/history/out-of-the-shadows-events-leading-to-the-founding-of-special-olympics</p> <p>Adidas: https://www.adidas-group.com/en/about/history/</p> <p>Toms Shoes https://www.toms.com/us/about-toms.html#companyInfo</p>
<p>Continue to add to the Branch history to recognize people and events with key milestones.</p>	

Appendix 8

Sponsorship Request Template

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

Sponsorship Letter Template

Best on stationery with the ASALH Branch logo

ASALH XYZ Branch
Street Address, City, State and Zip

January 1, 20____

Robert Sponsor to Community Groups
EFG Corporation
Street Address
City, State and Zip

Dear Mr. [Sponsor's Name]

I represent ASALH XYZ Branch, a local affiliate of the National Association, Founder of Black History Month. This branch was founded in [year] and has [#] members. Our mission is to promote greater knowledge of African American history through research and public education in our community. Notwithstanding the size of our membership, we are very effective in meeting our goals.

We are hosting a Black History Month Trivia Afternoon on Friday, February 15 at the [Somewhere] Community Center starting at 4:00 pm. We did this for the first time last year and it was such a huge success that we decided to host the event again.

Last year this event raised \$_____ that allowed us to conduct taped interviews with three African American veterans from our area for the Veteran's Day project, co-sponsored by the Library of Congress.

This year we hope to raise even more. Our goal is \$_____. We know that you have supported this type activity in the past and we are appealing to you for sponsorship support to help us reach this goal.

By becoming one of our [corporate/business] sponsors, you will be able to help us with three activities this year: Black History Month Program, continuation of the Veteran's Day project and take senior citizens on an excursion to historical African American sites.

We offer a few incentives and perks should you decide to become one of our sponsors. Regardless of the amount you choose to give, your company will be listed in our event program and any other publicity material, [including on our website] and you may send up to 10 persons to the event.

We are happy to accept monetary as well as in-kind donations. We are grateful for any contribution that you are comfortable with. [If applicable, add See attached Sponsorship Levels to find the giving amount that is right for your company.]

Thank you in advance for your generosity. Please do not hesitate to contact me at any time on XXX XXX XXXX if I can provide any additional information.

Sincerely,
[signature]

Requesting Robert
Chair, Fundraising Committee of ASALH XYZ Branch

Appendix 9

Contribution Request Template

**ASSOCIATION FOR THE STUDY OF
AFRICAN AMERICAN LIFE AND HISTORY**

Contribution Request Template

Best on stationery with the ASALH Branch logo

ASALH XYZ Branch
Street Address
City, State and Zip

June 1, 20__

Jane Donor to Community Groups
ABC Corporation
Street Address
City, State and Zip

Dear Ms. [Donor's Name]

I am the president of ASALH XYZ Branch, a local affiliate of the National Association, Founder of Black History Month. We are a small group of 15 members located in a financially distressed area in the state but our achievements over the past year far exceeded our numbers and circumstances.

In furtherance of our mission objective, we held three public education events centered on the social history and contributions of African Americans in the region. The events averaged 75 diverse attendees. The feedback was very positive and the community is asking for more. [success story, but could be an emotional appeal]

The need for public education on the contributions of African Americans to American history is needed now as ever, given recent political tensions around the teaching of African American History in schools. I know that [your company is a big supporter of equal justice causes that create change] or [your organization is trying to fix or has spoken out against]. While we are actively [working with our local institutions to expand our public education efforts], we need your help to make our efforts go even further! You can help us [to create a website and employ social media to reach even more people]. Your support is crucial to our efforts to [achieve this outcome].

We would love it if you could donate \$_____ to help us [elevate our media activities].

Thank you in advance for your contribution. Your donation will go toward [a worthwhile educational effort]. I will follow up with you in approximately 15 days to see if you need any additional information or if I should be communicating with someone else in your company. In the meantime, please call me on XXX XXX XXXX at any time.

Sincerely,

[signature]

Inquiring Jane
President, ASALH XYZ Branch

P.S. Our next event is a Historically Black College Bowl on September 10th.

Appendix 10

Dissolution or Closing of Branch

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

Dissolution or Closing of a Branch Notification

A branch experiencing problems that threatens its survival should inform the Vice President for Membership and ask for help.

A branch may cease to function for reasons that may include:

- Inability to furnish required annual reports needed by ASALH to complete its 990 tax return.
- Failure to comply with governing documents, such as, electing branch officers.
- Inability to sustain the required 15-member minimum to maintain a branch.
- Irreconcilable differences among branch officers, members, or both.
- National branch dues and other financial requirements prove to be a hardship on a large number of members.

If all options for resolving the deficiencies fail, the branch will be required to put forth a motion to dissolve the branch. If the membership passes the motion, the branch will be recommended to the Executive Council to be dissolved. If the branch does not approve the motion, the branch must submit in writing a plan of action to bring the branch into compliance.

Should members vote to dissolve the branch, a resolution must be prepared such as “**Resolved, that the XYZ Branch be dissolved as of date.**” According to the Roberts Rules of Order, this resolution may be preceded by a preamble setting forth the reason(s) for the dissolution. It is in effect a notice to rescind the constitution and bylaws, and therefore requires for its adoption the same notice and vote as to amend them. The required notice should be sent to all members of the branch on record at the time.

Should the Executive Council concur with the branch vote for dissolution, it shall notify the branch of its decision by submitting to the branch a resolution requesting that all remaining branch assets be transferred and forwarded to ASALH National. The Branch President will be sent a certified letter and all branch members will be notified electronically. The funds and files will be held by the National Office for an agreed period of time for the benefit of the branch in the event that it is re-formed or a new branch is formed in the same geographic area.

If the branch is not reconstituted or no replacement branch is formed, the funds will be added to ASALH’s general fund and the records will be maintained in ASALH’s historical files.

The Membership Committee will request that the Executive Council send the president of the existing Branch a letter confirming the official dissolution of the Branch.

Appendix 11

Request for Branch Rechartering

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

Request for Branch Rechartering

Submit by May 1

Thank you for your interest in reinstating an ASALH branch. Any ASALH member in good standing may complete an application for reinstatement.

This is a request to be considered for rechartering by the Executive Council at its **June** meeting. By signing below, I certify that the organizing committee of the rechartering branch has met or commits to meeting the milestones required for rechartering as indicated in the checklist below. Download this form [here](#).

STEP ONE:

- **May 1** is the deadline to file this request and meet set requirements.
- For a reinstatement, the legal name and mission of the branch must be the same as the discontinued branch.

STEP TWO:

- The application will be presented to the Membership Committee and if approved, to the Executive Council at its June meeting.

STEP THREE:

- Notification of the Executive Council's decision will be communicated within 48 hours by the Vice President for Membership.

STEP FOUR:

- If approved for reinstatement, the branch must go through the charter activation process described in this **Manual** to gain full charter status.

Branch Rechartering Request

1. Branch Description Name of Branch Location (City& State)	 Date of branch charter, <i>if known</i> Date of Branch dissolution, if known
2. Month and Year of discontinuance as ASALH Branch	
3. Reason for discontinuance as ASALH Branch	
4. State why the Branch should be reinstated	
6. If failure to file annual report(s) caused the discontinuance, was the Branch subsequently able to compile the data? If yes, submit report(s) with this request.	
7. Describe how the deficienc(ies) that caused the discontinuance has been corrected (Example: One Branch has put in place two officers who will be responsible for tracking information necessary to meet reporting deadlines: — Secretary and Treasurer. President will oversee this process)	

Checklist of Requirements for Rechartering

Requirement	Indicate Requirements Met/Will Be Met [Y or N]	Indicate if Required Documents were Submitted & Comments
Elect at least 5 Branch Officers (President, VP, Secretary, Treasurer & Historian) and submit: Branch Officers Form https://asalh.org/members/branch-directory/branch-officers-and-officers-changes/ Branch President Photo https://asalh.org/members/branch-president-photo-submission/		
Submit any proposed amendments to the Constitution and Bylaws of the discontinued branch, using the amendments process defined in Appendix 3 of this Manual .		
Submit a list of 15 current members including at least one (1) institutional member required for a chartered branch.		
Participate on scheduled branch calls with appropriate branch representation and disseminates the information.		
Represent newly chartered branch at Annual Conference and Chartering Ceremony with attendance by the Branch President or another Officer and Historian.		
Secure EIN immediately upon chartering.		
Establish a bank Account immediately upon receiving an EIN and provide the first transaction.		
Submit Operating Plan to show how branch will: <ol style="list-style-type: none"> 1. Execute required three (3) public programs: BHM, Founder’s Day and Woodson’s birthday 2. Engage branch members 3. Recruit new members 4. Contribute at least \$600 to ASALH by August 31. 		

Applicant: _____

Signature _____ Date: _____

Submit completed form to the Vice President for Membership at VPformembership@ASALH.org

Appendix 12

Fact Sheet

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

Fact Sheet

The Association for the Study of African American Life and History, Inc. (ASALH), incorporated October 2, 1915, under the laws of the District of Columbia is a non-profit, tax-exempt professional organization. Its founder was the late Dr. Carter Godwin Woodson, a Harvard trained scholar and international educator who was the son of former slaves. Woodson, like W.E.B. DuBois, realized early the important role of the African American (then “Negro”) in the history of the United States and world and committed his life to research on the African American past and to the dissemination of knowledge about people of African descent in the new world. The work of the organization has historically been the conservation and preservation of Africana history and culture.

The Mission of the Association for the Study of African American Life and History, Inc. (ASALH) is to promote, research, preserve, interpret, and disseminate information about Black life, history and culture to the global community.

The Vision of the Association for the Study of African American Life and History, Inc. (ASALH) is to be the premier Black Heritage learned society with a strong network of national and international branches and partners whose diverse and inclusive membership will continue the Woodson legacy.

Headquartered in Washington, DC, ASALH operates as local, state, and international branches promoting greater knowledge of Africana history through a program of education, research, and publishing. ASALH:

- supports the study of Africana history in homes, schools, colleges, churches, organizations, businesses, and government;
- provides a speakers ’bureau in support of Black History programs throughout the year;
- sets the annual theme for National African American History Month;
- sponsors specialized professional development curriculum workshops, institutes, and seminars;
- co-sponsors with the National History Day organization awards to high school students for winning projects, papers, or performances relating to African American History;
- sponsors an annual meeting and conference that provides a national venue for study, discussion and projection;
- supports diversity and racial reconciliation through dialogue and public education;
- sponsors undergraduate essay contests at annual ASALH meeting and conference; and
- supports and promotes the Carter G. Woodson Historic Site.

Current Program Interest

Annual Meeting and Conference. Plan to join us at our Annual Meeting and Conference held in cities throughout the United States each year. Visit our website at www.asalh.org for location and review of the exceptional educational program format and activities. The annual program has been designed to enable everyone to attend the session of their choice and promises to be outstanding and complete with exciting topics and presenters.

Black History Learning Resource Materials. Since the establishment of Negro History Week by Carter G. Woodson in 1926, ASALH has promoted the celebration of Black History expanding the

commemoration from a week to a month with the intention of studying this rich history the entire year. ASALH annually prepares and distributes learning resource materials based on the theme for educators, businesses and community groups, government agencies, and correctional institutions. Visit our website for the annual black history theme for the current year.

Professional Development and Networking for Teachers. At each annual meeting and conference, ASALH conducts a teacher workshop on the upcoming Black History Theme using National and State Social Studies Standards. Workshop seminars and institutes provide in-service and exchange opportunities for teachers on selected themes. Visit this link for ASALH Black History Themes. www.asalh.org

Collaboration and Partnerships. ASALH has worked with public agencies, including the National Endowment for the Humanities, Division of Education Programs, the Department of Defense, the National Park Service, Capital Region Area, National Trust for Historic Preservation, the National Education Foundation, the U.S. Customs Service, John H. Johnson and Johnson Publications, the Mary McLeod Bethune Council House, Library of Congress, Omega Psi Fraternity, Farmers Insurance, Kiamsha Youth Empowerment Organization, National Alliance of Faith and Justice (Pen or Pencil Movement), the Emmitt Till Annual Convention, Wachovia Bank (now Wells Fargo) , the Black African Arts and Culture Organization, private foundations, including the Ford Foundation and numerous colleges/universities and school systems. ASALH welcomes joint ventures with programs and organizations interested in diversity issues, racial reconciliation, and training through study, dialogue and public education.

ASALH Publications. Founded and edited in 1916 as the Journal of Negro History by Carter G. Woodson, the renamed Journal of African American History (JAAH) remains the "Jewel of ASALH." The oldest professional journal by and about people of African descent, the JAAH is a peer-reviewed, quarterly journal that serves the scholarly community. Edited by V.P. Franklin, University of California-Riverside, the JAAH is the premier journal in its field. A second publication is the Black History Bulletin (formerly the Negro History Bulletin), co-edited by LaVonne Neal, Dean of the College of Education at Northern Illinois University and Alicia Moore, Southwestern University. The Bulletin was initiated in 1937 at the suggestion of then President of The Association Mary McLeod Bethune as a training tool published by teachers for teachers. The inaugural edition of Fire!!! The Multimedia Journal of Black Studies was published in 2012. It is co-edited by Dr. Marilyn Thomas-Houston, University of Florida and Dr. Daryl Michael Scott, Howard University. **Fire!!!** promotes scholarship that gives direction to Black Studies, but sees its unique contribution as providing a publication venue for scholars who utilize multimedia evidence to advance their theories and interpretations. Under the ASALH Press ASALH publishes The Mis-Education of the Negro, Carter G. Woodson's Appeal, and Message in the Music.

Carter G. Woodson National Historic Landmark. The Carter G. Woodson Home in Washington, D.C. was designated a National Historic Landmark on October 30, 1975. In January 2000 a bill was introduced by Congresswoman Eleanor Holmes Norton initiating a study to authorize the Secretary of the Interior to study the suitability and feasibility of designating the Carter G. Woodson Home as a National Historic Site. The Bill establishing the Home as a National Historic Site passed the House and finally the Senate in November 2003. In February 2007, it was named the 389th Unit of the National Park System. The Carter G. Woodson Home was the home of The Association from 1923 until 1950 and has been the meeting place of many historical figures. On January 28, 2006, an official ceremony transferred the ownership of the Woodson home from ASALH to the National Park Service to ensure its future preservation.

International Intercultural Development. ASALH at points through the years maintained chapters in Liberia and Japan, thus highlighting the significance of international and intercultural understanding in the context of continuing global development. A branch in Nigeria began organizing in 2005. The task of overseas branches is to promote greater mutual knowledge and understanding of the relationship of American and African American history and culture and other cultures and nations, especially third world, developing and newly developed regions.

Appendix 13

Note About the Founder

ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY

Note About the Founder



Carter Godwin Woodson
1875 - 1950

CARTER GODWIN WOODSON, the son of former slaves, James and Eliza (Riddle) Woodson, was born December 19, 1875, at New Canton in Buckingham County, Virginia. One of a large poor family, he could not regularly attend school, but he was able, largely by self-instruction, to master fundamentals of common school subjects by the time he was seventeen.

Hoping to further his education, Carter and his brother, Robert Henry, moved to Huntington, West Virginia. He was forced to earn his living as a miner in the Fayette County coal fields. Not until 1895 was he able to enter the Douglass High School in Huntington, where he won his diploma in less than two years. He received his high school certificate with creditable grades. It is thus easy to understand that he earned the degree of Litt. B. from Berea College, Kentucky, 1901, after two years of study.

In his career as an educator, he served as principal of the Douglass High School, Supervisor of schools in the Philippines, teacher of languages in the high schools of Washington, D.C. and Dean of the Schools of Liberal Arts at Howard University and West Virginia State College. Ever a seeker for more knowledge, he earned the B.A. degree and the M.A. degree in 1908 from the University of Chicago, and the PhD degree in 1912 from Harvard University. A year of study in Asia and Europe, including a semester at the Sorbonne, and his teaching and travels abroad, gave him a mastery of several languages.

Convinced by this time that among scholars the role of his own people in American history and in the history of other cultures was being either ignored or misrepresented, Dr. Woodson realized the need for special research into the neglected past of the Negro. The Association for the Study of Negro Life and History, founded in Chicago, September 9, 1915, is the result of this conviction. In the same year appeared one of his most scholarly books, *The Education of the Negro Prior to 1861*. In January the following year, Dr. Woodson began the publication of the scholarly *Journal of Negro History* which, despite depressions, the loss of support from Foundations and two World Wars, he never missed an issue.

A chronicle of Dr. Woodson's far-reaching activities must include the organization in 1920 of the Associated Publishers to make possible the publication of valuable books on the Negro not then acceptable to most publishers; the establishment of Negro History Week in 1926; the initial publication of the *Negro History Bulletin*; the voice of the Association which has maintained continuous publication since 1937; the direction and subsidizing of research in Negro history by the Association; and the writing of numerous articles, monographs and books on the Negro. *The Negro in Our History*, now in its eleventh edition, has sold more than 90,000 copies. Dr. Woodson's most cherished ambition, a six volume *Encyclopedia Africana*, was not completed by the time of his death, April 3, 1950. Nevertheless, any encyclopedia of the Negro will have to rely heavily on the writings of Dr. Woodson, upon the *Journal* and the *Bulletin* and upon the other publications of those who he encouraged and inspired.

For his scholarly works and publications, Dr. Woodson is accorded a place of high rank in historical schools of the nation and the world.

Appendix 14

Books by Dr. Carter G. Woodson

**ASSOCIATION FOR THE STUDY OF
AFRICAN AMERICAN LIFE AND HISTORY**

Books by Dr. Carter G. Woodson

The Education of the Negro Prior to 1861

The Negro in Our History

The History of the Negro Church

The Rural Negro

African Myths Together with Proverbs

Negro Orators and Their Orations

The Mind of the Negro Reflected in Letters Written During the Crisis

African Heroes and Heroines

Encyclopedia Africana

The African Background Outlined

The Mis-Education of the Negro

Appendix 15

ASALH Headquarters Team

**ASSOCIATION FOR THE STUDY OF
AFRICAN AMERICAN LIFE AND HISTORY**

ASALH Headquarters Team

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RESOURCES AND LINKS TO ASALH's WEBSITE

Amazon Smile Charity	https://org.amazon.com/
Annual Report(s)	https://asalh.org/members/branch-informer/
ASALH Overview	https://asalh.org/branch-members-call/
Branch membership registration	https://asalh.org/wp-content/uploads/2021/11/2022-NATIONAL-MEMBERSHIP-FORM-FOR-BRANCH-MEMBERS.pdf
Branch Officers Form	https://asalh.org/members/branch-directory/branch-officers-and-officers-changes/
Branch President Photo	https://asalh.org/members/branch-president-photo-submission/
Certificate program	https://asalh.org/family-history/
Description of ASALH publications	https://asalh.org/document/journal-of-african-american-history/
Documents to have available at all branch meeting	https://asalh.org/wp-content/uploads/2020/01/DOCUMENTS-YOU-SHOULD-HAVE-AVAILABLE-AT-EACH-BRANCH-MEETING.pdf
Death notices	https://asalh.org/members/asalh-member-remembrance/
Form to publicize branch events	https://asalh.org/members/branch-informer/#events
Form to publicize branch news	https://asalh.org/branch-news-submit-form/
Form to publicize member books (member bookshelf)	https://asalh.org/submit-to-the-members-bookshelf/
Form to publicize branch events	https://asalh.org/members/current-member-event-submission/
Form to publicize member news	https://asalh.org/members/current-member-news-submission/
Grants	https://www.grantwatch.com/
Guide for planning branch events	https://asalh.org/wp-content/uploads/2020/02/Guide-for-Planning-Branch-Events...Committee-Functions-update.pdf
Installation Ceremony	https://asalh.org/wp-content/uploads/2020/01/SAMPLE-INSTALLATION-OF-OFFICERS-CEREMONY-officer-descriptions-included.pdf
Information Request	https://asalh.org/contact-us/
Job Board	https://asalh.org/category/job-board/
Logos, letterheads and graphics, and Zoom backgrounds	https://asalh.org/members/branch-media-toolkit/
Member Benefits	https://asalh.org/members/join/
Media Toolkit	https://asalh.org/brand/
Membership recruitment: <ul style="list-style-type: none"> ▪ Institutional member Recruitment ▪ Churches Rejoin 	https://asalh.org/branch-members-call/
Nominations for Executive Council and Executive Officer positions	https://asalh.org/submit-to-the-members-bookshelf/
Speakers Bureau	https://asalh.org/speakers-bureau/

