The Playbook of

External Engagement Strategies

October 2016
# TABLE OF CONTENT

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Summary</td>
<td>3</td>
</tr>
<tr>
<td>Engage Members of Congress and their Staff</td>
<td>5</td>
</tr>
<tr>
<td>Engage Media Proactively</td>
<td>6</td>
</tr>
<tr>
<td>Participate in Alliance Activities</td>
<td>7</td>
</tr>
<tr>
<td>Executing the Playbook</td>
<td>8</td>
</tr>
</tbody>
</table>

## APPENDIX CONTENT

<table>
<thead>
<tr>
<th>Appendix</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appendix 1: Alliance Messaging</td>
<td>10</td>
</tr>
<tr>
<td>Appendix 2: Suggested Key Words for International Exchange</td>
<td>11</td>
</tr>
<tr>
<td>Appendix 3: Sample Events with Elected Officials, Covered by Media</td>
<td>12</td>
</tr>
<tr>
<td>Appendix 4: Sample Media Advisory &amp; Press Release</td>
<td>14</td>
</tr>
<tr>
<td>Appendix 5: J Day Details</td>
<td>16</td>
</tr>
<tr>
<td>Appendix 6: Guidelines for Lobbying and Electoral Politics</td>
<td>17</td>
</tr>
<tr>
<td>Appendix 7: Congressional Leaders</td>
<td>19</td>
</tr>
<tr>
<td>Appendix 8: Calendar of Activities and Events</td>
<td>21</td>
</tr>
<tr>
<td>Appendix 9: Draft of Job Description</td>
<td>23</td>
</tr>
</tbody>
</table>
EXECUTIVE SUMMARY

Ongoing pressure on federal funding, combined with continued scrutiny of work-based J-1 visa programs, has created a “new normal” that poses profound challenges to our field and to every Alliance member organization. The exchange community previously enjoyed strong bi-partisan leadership from champions like Senators Edward Kennedy and Richard Lugar. However, today, the perception is that while we mostly have supporters of individual programs and/or issues, there are no true champions for international exchange at large.

This Playbook is designed as a resource to help Alliance member organizations cultivate congressional champions by raising our collective voice in support of international exchange programs. It provides strategies and accompanying tactics for:

- Engaging members of Congress and their staff locally
- Reaching out to the media proactively
- Participating in advocacy efforts
- Producing key data and reports

The Playbook is a tool supporting the external relations of the Alliance and its members. The goals of this Playbook are to: develop champions who will help with the policy needs of the Alliance and our members; and generate positive news stories and/or fair treatment by the media.

The Playbook provides a “menu” of engagement options. We understand that not every organization will have the capacity to engage in every activity listed. That said, every Alliance member organization should engage in at least some external outreach strategies throughout the year to more proactively promote international exchange to elected officials and the media. In an increasingly unpredictable environment, we need all the friends and supporters of State Department exchanges that we can get.

The Alliance will support our members through:

- Trainings for media engagement
- Toolkits
- Direct engagement with media and officials in Washington, DC
- Organized local engagement efforts in key congressional offices

We will also be available to answer questions and provide guidance throughout the development and execution of any activity outlined in the Playbook. Beyond the support we provide for Playbook implementation, the Alliance will continue its own work on Capitol Hill, at the State Department, and in local congressional districts.

Before getting started, you need to know the basic rules of engagement with elected officials. If you are a non-profit, you cannot contribute to political campaigns, nor support
or oppose a candidate for political office. For-profit entities also have limitations that apply to them. Nonprofits can, however, engage in lobbying efforts as long as they do not exceed the percentage threshold set by the IRS (roughly speaking, 20 percent for “direct” lobbying and 5 percent for “grassroots” lobbying). Most of the activities we outline in this Playbook are not considered “lobbying” and none involve electoral politics. External engagement is primarily about establishing relationships and sharing information. Please see Appendix 6 for more detail and consult, if necessary, an attorney for more information.

It would help greatly if the person in your office leading the external engagement has experience in media engagement or advocacy. Absent that kind of experience, your staff should be trained by the Alliance or another entity. Also, please note that the Playbook will be routinely updated, especially after each federal election. Consequently, you should check the Member’s Corner section of our website periodically to ensure you have the latest edition.
I. Engage Members of Congress and their Staff

Your work not only facilitates international exchange and engagement; at the local level, it also drives academic advancement, business partnerships, and economic growth. Members of Congress and their staff need to learn directly from you, their constituents, about the value of these programs to their districts or states. Other elected and appointed officials, such as mayors, council members, and Department of State (DOS) personnel, are also critically important. Alliance members can apply some of the below tactics in cultivating a relationship with those officials, too. Your engagement with congressional officials is essential in showcasing the specific impact of exchanges in your community and in developing the relationships needed to advance our mission.

The first step for engaging members of Congress and other elected officials is to determine which offices you will target. These could be the members of Congress and elected officials representing the state or district in which your organization is headquartered or where you have significant exchange program presence. The next step is to determine the names and email addresses of the key staff in those offices you should engage, both locally and in Washington, DC.

Once you identify the right elected officials and staff, there are a number of ways outlined below to engage that office. Please see the appendix for more details.

- **Share Information**
  Add elected officials’ staff to your email list so they receive periodic updates. Request meetings to brief the staff person directly when you issue a major report or when there are any noteworthy developments. Share articles about your programs or participants. Be smart about your outreach – you should not overwhelm congressional offices with emails and/or calls.

- **Expose to Exchanges**
  Take exchange participants and hosts to visit with elected officials and their staff. Or invite officials/staff to events that you’re already organizing for your participants and in which those participants are engaging (cultural, community service, etc.)

- **Invite to Events and/or Recognize**
  Invite an official to speak or serve as the master of ceremony (MC) of one of your major events. Consider hosting an event, such as a panel discussion featuring the Member and compelling exchange participants; or present the official with an award or recognition if they have supported exchanges.

- **Support through Social Media**
  Like their Facebook page and post items. Tweet about them and re-tweet their messages; make sure to always use their Twitter handles. If you meet with them or their staff, take a photo and post it with a note of thanks.
• **Include in Newsletters, Social Media**
  Request an article and/or letter on exchanges that you can use in your newsletters. Or request a video a message that you put out on social media and your website.

• **Engage in Advocacy**
  Attend “town hall” meetings and other constituent gatherings where you can present your opinion about an issue. Have exchange participants and hosts send letters in support of your program(s). Visit their offices locally and/or in Washington, DC as part of a broader Alliance advocacy push. Ask that they help you with challenges that you are facing with other officials, such as other members of Congress or the Department of State.

While it may not be possible to use all of these tactics in any given year, we strongly encourage you to incorporate at least a few in your annual activities. Integrating engagement of elected officials and their staff into your normal course of business will have a significant long-term positive impact on your organization’s and programs’ recognition and in creating champions for international exchange as a whole.

II. **Engage Media Proactively**

A key piece of building public awareness of the power of exchanges is creating a broad swath of reporters who understand exchange programs and have engaged with them in positive ways. In the vast majority of cases, reporters will be friendly recipients of information and treat you fairly. Therefore, the benefits of engaging with the media far outweigh the potential risk of a bad news story.

It is critical that whoever is engaging the media from your organization is either a communications professional (which is preferable) or has been trained on media engagement.

As with elected officials, the first step is to identify key local reporters and organically build a press list. You can do that by figuring out through Google or another search engine which reporters are writing stories on your programs or on related issues (e.g., local economy, education, culture, travel, international affairs, etc.). Create and manage a spreadsheet or electronic contact management system with their contact information. Once you establish who those key reporters are, consider engaging them in the following ways:

• **Share Information**
  Add reporters to your email list so they receive periodic updates. Follow them on Twitter and direct messages to them so that they follow you, too. Share reports and media stories from other sources as well.
• **Report on Events and People**
  Invite reporters to cover officials speaking at major events, exchange participants and hosts engaging in community service, officials receiving honors or recognition, and other newsworthy activities. Invite reporters to interview exchange participants and/or hosts who can tell compelling stories (e.g., regarding their achievements, serving in the community, how they are breaking down stereotypes, etc.).

• **Engage as Part of Advocacy Effort**
  Send press releases and op-ed submissions. Invite reporters to issue briefings.

• **Utilize Key Messages**
  Ensure that you are using our broad messaging as a frame for your engagement with the media and the right set of words in your material (see Appendix 4).

Many small, local news outlets will run stories written by non-reporters. If you write the article and include a photo, your article will have an even greater chance of being published!

**III. Participate in Alliance Activities**

The Alliance conducts an array of activities designed to strengthen our relationship with elected officials, increase the effectiveness of our members, and create greater bonds across organizations within the exchange community.

• **Join Advocacy Days**
  The Alliance hosts advocacy days in Washington, DC, which include a prep session focused specifically on messaging, followed by individual meetings with Senate and House offices. These offices have the ability to increase or cut federally funded exchange programs, as well as to expand or restrict privately funded J-1 visa exchanges. While the Alliance meets with congressional offices regularly, elected officials are much more receptive to constituents or entities that directly represent or have an impact on their constituents. Therefore, having members come to Washington for congressional meetings is critical. Alliance members can share in a meaningful way compelling exchange stories and data that may prompt congressional offices to take action.

• **Attend Alliance Annual Meeting**
  The Annual Meeting is a critical gathering. We bring members together with key Department of State officials to engage in frank conversations, while also building and maintaining bridges of cooperation. Additionally, members get to network with their counterparts at other organizations, learn new approaches, and share best practices.
• **Collect and Share Data**
  Having the right data showing the impact of international exchange is critical to telling powerful stories to people in influential and decision-making roles. The Alliance has begun collecting raw data from member organizations. Members are asked to include a set of eight standard questions – applicable across all J-1 visa Exchange Visitor Program (EVP) categories – into their participant satisfaction surveys and report the results back to the Alliance on a seasonal (for SWT) or annual basis. While this project is a good first step, we need to step up our game. That means getting data from all members every year. It also means working across the Alliance to collect and report out data that supports both the entire exchange industry, as well as specific program areas.

• **Participate in J Day**
  J Day is a nationwide celebration of the power of international exchange. Events typically occur on the first Monday in August under the tagline "Eat, Play, Give." International exchange participants across all exchange programs come together with their American hosts to experience American culture, to give back to their host communities, and to have some fun. J Day is a particularly good opportunity to raise awareness of privately funded exchange programs (See appendix 5).

• **Participate in Training Workshops**
  For a number of years, the Alliance has been conducting workshops at the Annual Meeting in Washington as well as in various locations across the U.S. Our workshops have focused on crisis communications, student safety, and story-telling. These sessions are unique opportunities for staff at all levels to learn and share best practices that can be applied directly in their daily work. The workshops will expand in the near future to include online tutorials.

IV. **Executing the Playbook**

**Alliance Support**
The Alliance is updating its Member’s Corner portal on our website to give members easier access to important resources. Additionally, the Alliance will provide a range of support for members that includes: in-person group trainings; online discussions; and sample documents.

In addition to your external engagement, the Alliance will work with members to target outreach to specific members of Congress who hold key positions of power and/or influence. We will also organize “Road Show” meetings with congressional offices, our members, exchange participants, and hosts (as appropriate).

**Coordinating with Other Alliance Members**
In many instances, different Alliance members are headquartered or have significant program activities in the same location. Where that is the case, we recommend you seek out opportunities to coordinate with each other. Such coordination could include:
- Sharing information with other members about your external engagement activities
- Co-hosting an event (briefing, award event, J Day activity) with elected officials
- Forming a regional coalition that meets regularly, plots strategy, and engages in a range of activities as a group

The Alliance is ready to help member communities that consider forming coalitions.

**Member Staffing**

In order to execute on the Playbook, members are encouraged to designate (by hiring externally or assigning someone internally) a person who is responsible for executing the Playbook activities and acting as a liaison with the Alliance. For organizations that have the capacity to hire or assign someone full time to do this work, please see Appendix 1 for a job description. For smaller organizations that do not have that capacity, we encourage you to decide which of the activities in this Playbook you are able to execute with your current staff. Alternatively, you can partner with another exchange organization or join the Alliance activities described above. Either way, we strongly suggest you assign someone to be a liaison with our office. The Alliance will provide on-going training opportunities and support for member staff responsible for external relations.

**CONCLUSION**

The long-term health and growth of international exchange programs are strongly dependent on how those programs are perceived by the general public and understood by policy-makers. This Playbook of External Engagement Strategies is designed to shape public opinion through the systematic and strategic engagement of the media across the country by all members of the Alliance. The strategies are also designed to deepen the understanding of exchanges among elected officials and their staff. By engaging the media and elected officials, Alliance members will also deepen relationships with people who could be very helpful when exchange participants are in trouble or programs are being attacked. These upfront investments in relationships take a great deal of time and resources. But, that pales in comparison to the difficulties we face when reaching out to the media and officials after a problem arises. The Alliance looks forward to helping you make those investments by implementing the external engagement strategies outlined in this Playbook.
APPENDIX 1:

ALLIANCE MESSAGING

The Alliance is making a conscious effort to streamline and make consistent our messaging both on the organizational level as well as among the larger exchange community. The more our community can consistently and repeatedly use the same talking points and messaging, the more effective we will be at communicating our message.

We have identified three broad talking points that we strongly encourage you to use when talking or writing about the benefits of State Department exchanges. These three talking points are applicable to all State Department exchange programs, federally- and privately-funded alike.

1) National Security
Exchange programs support U.S. national security & foreign policy interests:

- Engage with countries key to U.S. interests: China, Brazil, Russia, Pakistan etc.
- Facilitate global engagement
- Advance U.S. leadership and interests around the world

2) Economic Impact
Exchange programs strengthen the U.S. economy:

- International students add ~$30.5 billion to the U.S. economy
- Exchanges bring resources to U.S. communities (in program dollars, visitors spending cash, and connections for local businesses/individuals)
- At 0.015% of the overall federal budget, the economic benefits exchange programs return to the U.S. far outweigh the relatively modest expenditure

3) Mutual understanding
Exchange programs increase mutual understanding:

- Exchange participants learn about the U.S. while Americans in host communities across the U.S. learn about other countries and cultures
- Overseas participants complete programs with a better, more nuanced, and more favorable impression of the U.S., its culture and its people
- Engage current and future leaders
APPENDIX 2:

**SUGGESTED KEY WORDS FOR INTERNATIONAL EXCHANGE**

The following are suggestions of appropriate words to use when referring to international exchange programs. This list can be adjusted based on the particular program. The overarching goal is for people to understand that exchange programs are first and foremost serving cultural and educational purposes, even when they have a built-in “work” component. Whatever words you choose, consistency in messaging is key. From your international partners, to your program managers, to your hosts, you should encourage everyone to use the same words and phrases.

### Words to Use

- International
- Students
- Participants
- Cultural Ambassadors
- Scholars and researchers
- Exchange
- Host family
- Host organization
- Global leaders
- Culture and customs
- Education
- University coursework
- Educational component
- Cultural component
- Public diplomacy
- Foreign policy
- Federal program
- National standard
- Stipend
- Short stays
- School breaks/summer vacation
- Services
- Support staff
- International partner

### Words to Lose

- Foreign
- Workers
- Guests or guest workers
- Nanny
- Employment
- Domestic
- Temporary
- Labor
- Cheap childcare
- Immigration
- Agent
- Recruiter
- Kids

### Use Sparingly

- Seasonal
- J-1 Visa
- Wages (use only for SWT)
- Work (use only for SWT)
- Children (use only for Au Pair)
- Affordable childcare (use only for Au Pair)
APPENDIX 3:

SAMPLE EVENTS WITH ELECTED OFFICIALS, COVERED BY MEDIA

Many Alliance members are already organizing and staging a wide range of events every year that include participants, hosts, and others. Please feel free to use the strategies outlined above to engage elected officials and the media in those activities. If you are looking for additional activities and/or are trying to figure out what you might organize, the below list is for you.

Panel Discussion
A program sponsor organizes a panel discussion on international exchange. A local high school, college, chamber of commerce, or other community institution could host the event. The event topic could be issues of importance (or opportunities and challenges) facing a particular exchange program. Panelists could include a member of Congress sharing the federal perspective (i.e., funding, regulations, etc.), a sponsor organization, an exchange participant, and other stakeholders (parent, business, school). The target audience could include potential participants and hosts, as well as community stakeholders. A reporter or media commentator could serve as the MC.

Community Service
Exchange participants perform community service. A local official could welcome participants, talk about the importance of volunteerism, and thank them for serving the local community. The local official may stay for an opening breakfast/lunch to interact with the participants before their service. The official may also participate in the service activity, which could include: environmental cleanup/tree planting; volunteering at a food pantry and/or soup kitchen; participating in local school events; and/or organizing a clothing/school supply drive.

Award Event
A sponsor organizes an event at which a member of Congress or other elected official is recognized for their exemplary leadership or for supporting exchange programs. The event could be a reception, dinner, lunch, or breakfast. Others could be recognized, too, including hosts, volunteers, and participants.

Host Family Meet-and-Greet
In addition to engaging with exchange participants, a local official may have a particular interest in meeting host families, especially if they are constituents. At a host family meet-and-greet, a sponsor can facilitate such interactions in a casual setting (e.g. at the congressional district office, at a picnic with outdoor games, or at a local school gathering). Exchange participants could ask the local official questions about the U.S. government, the local community, U.S. foreign policy, and other topics in a Q&A session. The local official could also ask host families to share more about their experiences hosting exchange participants and the value these programs have on a personal level.
Holiday Meals
Exchange participants gather to celebrate a traditional American holiday (e.g.: Fourth of July, Thanksgiving). Program sponsors briefly introduce the holiday, its history, and traditions. Exchange participants prepare and enjoy typical recipes. A local official could help to introduce the holiday and add personal stories about their own holiday celebrations. They could also share a family recipe with the exchange participants, help them to prepare the food and/or enjoy the food once it has been prepared. Alternatively, for events celebrated across the globe (e.g. New Year’s), exchange participants could have a “cultural fair.” Rather than learn only about U.S. traditions, participants could gather to share recipes/food, games, and traditions from their respective countries. Local officials could be integrated in a similar way to the above, by sharing their American perspective on the holiday.

Local School Involvement
Exchange participants visit a local school and present to a group of students about their respective countries. This could be coordinated with the teacher to relate to current events or a topic relevant to what the students are studying. It would be beneficial to provide students with opportunities for a Q&A session with the exchange participants. A similar event could involve study abroad returnees speaking to a group of high school students and/or principals, teachers and counselors about their experiences abroad. This event would aim to highlight the value of study abroad opportunities and encourage school staff and faculty to facilitate such opportunities for their students. Congressional staff could be asked to provide introductory remarks and serve as the MC during a Q&A period.
APPENDIX 4:

SAMPLE MEDIA ADVISORY & PRESS RELEASE

Sample Media Advisory
The purpose of a media advisory is to give the basic details (who, what, where, when, why) of an event to the media before the event takes place so that you can get them to attend. It should be sent out about one week before the date of your event to the assignment editor or planning desk of a TV or radio news desk, or the appropriate editor/reporter at your local newspaper. It should be sent in the body of an e-mail. Feel free to use or adapt the sample below to meet your needs.

MEDIA ADVISORY

[Date] FOR IMMEDIATE RELEASE

[Title – include name of organization, event name & enticing description]

[Name of organization] is hosting a community service event in [location] as part of [describe bigger purpose of event] e.g.: “J Day” – the annual celebration of international exchanges and a chance to highlight the benefits of the J-1 visa Exchange Visitor Program to the American economy, national security, and mutual understanding between peoples of all nations.

Date: [Day of week, Month, Date, year]
Time: [XX:00am- XX:00pm]
Location: [Address, City, State]
Additional Info: [Details on what attendees/participants will be doing]

[Additional Details - describe the need for your event and why you are holding it. What is the local issue you are addressing?] e.g.: J Day is an initiative that connects international exchange participants with Americans and provides a space for cultural exchange. Under the motto “Eat, Play, Give,” sponsor organizations provide exchange participants an opportunity to enjoy American cuisine, share cultural diversity, and take part in volunteering in their host communities.

The Alliance’s event is one of over 27 different community service events being hosted in 17 states around the U.S. by members of the Alliance for International Exchange as part of J Day.

Media inquiries can be directed to:
[Name, Position, xxx-xxx-xxxx, xxx@alliance-exchange.org]

[insert boilerplate language for your organization]

###
Sample Press Release
The purpose of a Press Release is to announce a range of news items, including scheduled events, personal promotions, awards, new products and services, sales accomplishments, etc., on the day that you are making news (or relatively shortly thereafter). It can also be used to generate a feature story. It should be sent in the body of an e-mail where possible. Feel free to use or adapt the sample below to meet your needs.

PRESS RELEASE
For Immediate Release
[Date]

[Name of Org] Hundreds of Exchange Participants Celebrated J Day by Cleaning Anacostia River

[City, State, – Begin press release by providing a quick overview of the who, what, when, where, why of your news] e.g.: Washington, D.C. – On Monday, August 1, 2016 exchange participants from all around the world helped to clean the Anacostia River in celebration of J Day.

[Provide background information] "[J Day] is a nationwide celebration of the power of international exchanges and an opportunity to raise awareness of the J-1 visa Exchange Visitor Program. J Day is coordinated by the Alliance for International Exchange. This year twenty organizations hosted over thirty service and community events around the country. [Name of org] hosted the river cleanup as part of that national celebration. Exchange participants volunteer their time. Host employers, officials, local people, and friends are invited to attend. Most events are open to the general public.

[Insert quotes/comments by organization leadership]

Under the motto “Eat, Play, Give,” exchange organizations from New York to Texas and California to Florida held J Day Celebrations. Exchange participants attended clothing drives for struggling families, served food to the homeless, and held athletic competitions.

[Insert quotes from exchange participant]

Participation in this event, either in person or virtually, will help spread the word about the impact and breadth of cultural exchanges in the United States.

[Please contact xxx@alliance-exchange.org for more information about J Day]

[insert boilerplate language for your organization]

###
APPENDIX 5:

J DAY DETAILS

J Day is an annual opportunity to connect exchange participants to their local communities primarily through service projects. Sponsor organizations are encouraged to organize a social event for exchange participants with a service component to it, and invite members of the community such as: elected officials, police officers, firefighters, host families, etc. By inviting elected officials to participate and local media outlets to cover it, J Day also provides a great opportunity to highlight these programs to decision-makers and the general public. We encourage privately funded programs (and federally funded if possible) to consider organizing an event.

How does J Day work?

• Participate or plan an event in your community. Following the theme "Eat. Play. Give." ideally all events will incorporate classic American food (i.e. BBQ), a fun activity, and a community service component. The event location should be accessible to a significant number of participants. Different sponsors can collaborate at a single location. We encourage non-Alliance sponsors and employers to host or participate in events.

• Join social media campaign leading up to J Day, during events, and the day-of. The bigger reach we can have online, the bigger the impact will be for sharing the benefits of these programs.

• Engage local elected officials and the media as you plan your events. We encourage sponsors to reach out and invite local elected officials and let your local media outlets know about your event.

• In order to help brand "J Day" as a recognizable annual celebration, all sponsors should follow the J Day Style Guide. Ideas for branding include: purchasing T-shirts for your participants, posters, flyers, and Facebook images.
Many misconceptions exist in the exchange community surrounding the topic of advocacy. This section aims to explain the benefits of advocacy and eliminate those misconceptions by providing a brief understanding of the issue for 501(c)(3) organizations. For more detailed information, please download the Alliance for Justice Philanthropy Advocacy Playbook here: http://www.bolderadvocacy.org/focus-on-foundations/philanthropy-advocacy-playbook

Advocacy Produces Solutions
When leading and participating in numerous advocacy initiatives, it is important to remember that these activities play a crucial role in achieving your greater mission. A small and focused advocacy campaign can lead to big changes. In short, advocacy produces lasting solutions:

- Advocacy addresses systemic causes rather than symptoms
- Advocacy supports democratic processes and allows all voices to be heard
- Advocacy provides policy makers with new perspectives and missing information
- Advocacy brings together diverse members of the community to solve problems

Guidelines for Public and Private 501(c)(3) Organizations
501(c)(3) Organizations encompass most charitable, educational, scientific, religious and literary tax-exempt organizations. The tax status of an organization (public or private) primarily determines whether it can lobby or earmark grants for lobbying.

- **Public** (broad public funding support): May engage in a limited amount of lobbying and make grants earmarked for lobbying
- **Private** (limited sources of funding): May not lobby or earmark funds to support lobbying, although they may provide grants to public charities that lobby

Fewer Limitations than you think
There are no limits on most advocacy activities. Whether an organization’s tax status is defined as public or private, it can engage in most types of advocacy. Advocacy activities can include:

- Policy research
- Grassroots organization
- Nonpartisan voter education
The exception is that **election-related activity** and **lobbying** are subject to legal restrictions.

- All 501(c)(3) organizations are prohibited from supporting or opposing candidates for public office.
- Lobbying, an effort to influence legislation, is an impermissible activity for private organizations, but permissible for public organizations (with limitations). You can calculate lobbying limits for a **public** organization in two ways:
  - **501(h) Expenditure test** – generally allows an organization to spend up to 20 percent of its annual expenditures on lobbying. For more info, see the *Philanthropy Advocacy Playbook* (p. 14)
  - **Insubstantial Part test** – lobbying must be an insubstantial part of overall activities (usually less than 5 percent). This is still a lot of room for big organizations.

In short, most efforts to influence legislation will not constitute lobbying. Other forms of advocacy as described in this Playbook, such as educating the public, are not considered lobbying and will not count towards the limits outlined above. Moreover, the overwhelming majority of advocacy activities (including lobbying) are legally permissible. For a detailed breakdown, see p. 14 chart of the *Philanthropy Advocacy Handbook*. 
APPENDIX 7:

CONGRESSIONAL LEADERS

It is essential that we, the exchange community, engage especially those Members of Congress who serve on Congressional Committees key to international exchange:

State-Foreign Operations (SFOPS) Appropriations Subcommittees
Responsible for allocating funds to the Department of State and State Department exchange programs

<table>
<thead>
<tr>
<th>House</th>
<th>Senate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair: Kay Granger (R-TX, 12th)</td>
<td>Chair: Lindsey Graham (R-SC)</td>
</tr>
<tr>
<td>Ranking Member: Nita Lowey (D-NY, 17th)</td>
<td>Ranking Member: Patrick Leahy (D-VT)</td>
</tr>
</tbody>
</table>

Foreign Affairs/Relations Committees
Authorized to establish, continue, or modify agencies (Department of State) or programs (State Department exchange programs)

<table>
<thead>
<tr>
<th>House</th>
<th>Senate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair: Ed Royce (R-CA, 39th)</td>
<td>Chair: Bob Corker (R-TN)</td>
</tr>
<tr>
<td>Ranking Member: Eliot Engel (D-NY, 16th)</td>
<td>Ranking Member: Ben Cardin (D-MD)</td>
</tr>
</tbody>
</table>

Judiciary Committees
Provide oversight of the Department of Justice and agencies under the Department’s jurisdiction, including the Federal Bureau of Investigation (FBI) and the Department of Homeland Security (DHS); consider legislation on other matters, including immigration

<table>
<thead>
<tr>
<th>House</th>
<th>Senate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair: Bob Goodlatte (R-VA, 6th)</td>
<td>Chair: Chuck Grassley (R-IA)</td>
</tr>
<tr>
<td>Ranking Member: John Conyers (D-MI, 13th)</td>
<td>Ranking Member: Patrick Leahy (D-VT)</td>
</tr>
</tbody>
</table>

Party Leadership

House
Paul Ryan (R-WI, 1st) – Speaker of the House
Kevin McCarthy (R-CA, 23rd) – Majority Leader
Steve Scalise (R-LA, 1st) – Majority Whip

Senate
Mitch McConnell (R-KY) – Majority Leader
John Cornyn (R-TX) – Majority Whip

Nancy Pelosi (D-CA, 12th) – Minority Leader
Steny Hoyer (D-MD, 5th) – Minority Whip

Harry Reid (D-NV) – Minority Leader
Dick Durbin (D-IL) – Minority Whip
Congressional International Exchange and Study Caucus

In October 2015, a Bipartisan Congressional International Exchange and Study Caucus was formed. The Caucus’ primary goal is to raise awareness of the importance and benefits of international exchange and study programs, which enable international citizens to have meaningful exchange experiences in the United States and Americans to have such beneficial experiences in other countries. The Alliance is in close cooperation with the Caucus, among others providing Caucus Members a monthly Exchanges Digest and organizing Caucus briefings. While it is important to engage all Members of the Caucus, it is especially critical to engage the Caucus Co-Chairs.

Caucus Co-Chairs
Steve Pearce (R-NM, 2nd)                                      Jim Himes (D-CT, 5th)

Caucus Members
Rob Bishop (R-UT, 1st)                                      Don Beyer (D-VA, 8th)
Marsha Blackburn (R-TN, 7th)                                John Carney (D-DE, at large)
Mike Conaway (R-TX, 11th)                                   Elijah Cummings (D-MD, 7th)
Brett Guthrie (R-KY, 2nd)                                    Elizabeth Esty (D-CT, 5th)
French Hill (R-AR, 2nd)                                     Denny Heck (D-WA, 10th)
Lynn Jenkins (R-KS, 2nd)                                    Bill Keating (D-MA, 9th)
Blaine Luetkemeyer (R-MO, 3rd)                              Derek Kilmer (D-WA, 6th)
Reid Ribble (R-WI, 8th)                                     Ron Kind (D-WI, 3rd)
Ed Royce (R-CA, 39th)                                      Annie Kuster (D-NH, 2nd)
Glenn Thompson (R-PA, 5th)                                  Ted Lieu (D-CA, 33rd)
Rob Wittman (R-VA, 1st)                                    Dave Loebsack (D-IA, 2nd)
                                                           Jim McGovern (D-MA, 2nd)
                                                           Mark Pocan (D-WI, 2nd)
                                                           Kathleen Rice (D-NY, 4th)
                                                           Louise Slaughter (D-NY, 25th)
                                                           Paul Tonko (D-NY, 20th)
                                                           Chris Van Hollen (D-MD, 8th)
                                                           John Yarmuth (D-KY, 3rd)
APPENDIX 8:

CALENDAR OF ACTIVITIES AND EVENTS

We strongly encourage you to engage in external engagement activities promoting international exchanges throughout the year. A calendar with sample activities and events relevant to all or specific exchange programs is provided below as a guideline.

1st Quarter (Jan-Mar)

Federally funded programs:
- Determine community “ask” with Alliance appropriations task force and organizational “asks” for individual programs
- Discuss “asks” with congressional offices of members serving on the State-Foreign Operations (SFOPS) Appropriations Subcommittees
- Submit appropriations requests to congressional offices (especially to SFOPS members)

All programs:
- Create email lists for local officials’ staff and local reporters
- Begin sharing regular updates with officials and reporters
- Brainstorm potential engagement activities for participants and elected officials throughout the course of the year
- Provide an overview of upcoming events, interesting topics to press contacts (in person if possible)
- Invite local press and elected officials (e.g. city mayor, state representative/senator) to attend an event with exchange participants and/or hosts
- Create a list of relevant officials’ Twitter handles to follow and readily tag in posts and share with staff
- Create a list of regional Alliance members to potentially coordinate with in terms of information sharing, event planning, and general strategizing
- Designate/hire staff member to lead Playbook implementation
- Participate in Alliance Advocacy Day
- Advocacy Day follow-up on federal and local level
  - Send thank you email to federal offices
  - Organize meeting with local offices and/or send email update

2nd Quarter (Apr-Jun)

All programs:
- Continue sharing regular updates with officials and reporters
- Attend Alliance regional workshops
- Begin planning J Day activities
- Identify outstanding exchange participants and/or hosts and have them featured in a local news article; share with the Alliance
- Send brief update/share relevant local news article with congressional offices (DC and local staff) and other elected officials
- Begin planning and/or execute on in-district/in-state meetings with congressional offices to showcase the local impact of international exchanges
- Invite an elected official to be honored or serve as a keynote speaker
- Reach out to regional Alliance members to share upcoming events

**SWT category:**
- Submit J-1 EVP survey results for winter season to the Alliance
- Circulate press release in advance of summer participant arrival

**3rd Quarter (Jul-Sep)**

All programs:
- Organize and participate in J Day events
  - Brief press contacts prior to J Day events; invite them to cover event
  - Invite local congressional staff and other elected officials to J Day events
  - Circulate J Day success press release following event
- Conduct in-district/in-state meetings with congressional offices during the August recess – bring participants, hosts, members of the community and other relevant stakeholders
- Request a letter of support for marketing materials/message of support for social media from congressional staff
- Form an informal coalition with interested Alliance members to regularly share information and strategy and share this news with the Alliance

High school category:
- Submit J-1 EVP survey results to the Alliance

**4th Quarter (Oct-Dec):**

All programs:
- Participate in Alliance Annual Meeting
- Schedule visits with congressional offices in conjunction with Annual Meeting
- Send holiday season/year-in-review update to congressional offices and other elected officials, as well as the press (on background)
- Hold team meeting to determine advocacy goals for the next year
- Discuss updates to congressional, media, and Alliance member contact lists for the upcoming year
- Encourage exchange participants and hosts to send letters to congressional offices in support of programming
- Send thank you letters to elected officials, as appropriate

Au Pair/Teachers/Intern/Trainee/SWT/Camp Counselor categories:
- Submit J-1 EVP survey results to the Alliance

**SWT category:**
- Circulate press release in advance of SWT participant arrival
**APPENDIX 9:**

*DRAFT JOB DESCRIPTION*

**Director for External Relations**

**General Description**
The Director for External Relations is responsible for advancing our education and advocacy agenda through local and state activities in coordination with the Alliance for International Exchange. S/he works in close coordination with other staff and reports directly to the President.

The goals of external relations are to: develop champions who will help with policy and/or funding needs of the organization and the Alliance; generate positive news stories and/or fair treatment by the media; and provide an outlet for exchange participants and hosts who are interested in promoting international exchange programs in the United States.

**Qualifications**
The Director will have five or more years of public and/or government relations experience. S/he will have experience managing people and events, an acute understanding of messaging, and a successful history as a team player. The Director will also be a strategic thinker who can see connections between policy and personalities, and a relentless connector who creates common cause among people with differing interests. A bachelor’s degree is required. A master’s degree and international experience are preferred.

The Director will have the following core responsibilities:

**Grassroots Engagement and Advocacy**
Facilitates exchange participant and host interactions with district and state congressional offices, as well as with other elected and appointed officials and community leaders. Organizes, in coordination with the Alliance, write and call-in campaigns directed at elected and appointed officials. Helps recruit members to participate in Alliance Advocacy Days in Washington, DC and local advocacy meetings.

**Education and Communication**
Develops education and engagement programs (emails, newsletters, briefings, meetings, reports, etc.). Ensures organization’s messaging and language are aligned with Alliance recommendations. Coordinates media outreach, interviews, and cultivation. Helps draft appropriate communications, collects information about implementation, and reports to the President.

**Representation**
Serves as the organization's principal liaison to officials and external partners, especially the Alliance for International Exchange. Represents the organization as appropriate at community and governmental meetings, conferences, etc.