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# **EWI Business/ Career/Development Program Resource Guide dba EWI Foundation**

**November 2013**



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## B/C/DP dba EWI Foundation Resource Guide

### History / Overview

The Business/Career/Development Program (B/C/DP) began in 1974 when Sears, Roebuck and Co. invited EWI to become involved for the purpose of involving the members of Executive Women International in community projects and to encourage the development of careers in business among high school students. Sears co-sponsored and funded the program from 1974 through 1981.

EWI continued the program in 1981 through self-sponsorship, and in 1982 a revised program co-sponsored by Lanier Business Products was initiated. The organization operated as a nonprofit, unincorporated association known as Executive Women International Business Career Development Scholarship Program (BCDSP). In September 1985 application for exemption was made to the Internal Revenue Service for Executive Women International Business Career Development Scholarship Program (BCDSP). Status as a 501(c)(3) organization was granted August 21, 1986. Lanier co-sponsored and funded the program through 1986 and co-funded with EWI fully administering the program in 1987. January 1, 1989 Executive Women International assumed responsibility to fund and administer the program.

The following year, January 1, 1990, the name was changed to the Executive Women International Scholarship Program (EWISP). The program began to expand from development for high school students to include adult development. An Adult Students in Scholastic Transition (ASIST) program was added at the Chapters level in 1992 to provide financial support to adult students in a variety of transitional situations. In September 1993 the name changed to Executive Women International Business/Career/Development Program (B/C/DP), which included the scholarship program (EWISP) and other programs which had been expanded, such as ASIST, and other philanthropic endeavors as they may occur. In 1997, the ASIST program was added at the Corporate level, further expanding our philanthropic efforts.

The Academy of Leadership was instituted in 2001 for the purpose of teaching functional and situational leadership, increasing professional and personal competencies, and creating opportunities for career advancement for all Executive Women International representatives. Representatives who have participated in four Academy courses are considered Academy of Leadership Alumni. In recognition of their status, Alumni members are offered special learning opportunities.

An Executive Women International Fellows Program (EWIF) was approved for development at the 2004 Leadership Conference & Annual Meeting and was launched at the 2005 Leadership Conference & Annual Meeting. This program was designed to provide Executive Women International representatives an opportunity to further their own undergraduate or graduate education at an accredited institution of higher learning.

In 2011, EWISP moved from a merit based system to a need based system. Finding the acronym B/C/DP to be the terminology of choice when referencing the Executive Women International Business/Career/Development Program to be ambiguous, the name was changed to the Executive Women International Foundation in 2013 to encompass a better overall representation umbrella of the program.

EWI Business/Career/Development Program (B/C/DP) dba EWI Foundation is a 501(c)(3) organization with four initiatives. They are Executive Women International Scholarship Program (EWISP), Adult Students in Scholastic Transition (ASIST), EWI Fellows Program and the International Literacy Program.

The EWI Foundation provides guidelines to the organization's chapters to fulfill any or all of the initiatives established as well as offering scholarships and programming from the corporate body Academy of Leadership. All programs support the mission of the 501(c)(3).

The EWI Foundation also includes the international philanthropy project to be literacy (annual Reading Rally



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Project). and annual literacy and Reading Rally Project. Today all scholarship programs, the international philanthropic project and all professional development programs operate under the Executive Women International Foundation umbrella. All programs support the mission of the EWI B/C/DP.

### Tax Exempt Status

The organization and the Chapters were granted permanent tax-exempt status by the Internal Revenue Service under the Federal Income Tax Section 501(c)(3) of the Internal Revenue Code on June 10, 2002. The 501(c)(3) Tax Identification Numbers for each Chapter are listed on *IRS Identifying Numbers for BCDP and Subordinates*.

All changes to the list of subordinates included in the tax-exempt status are submitted to the IRS by the corporate office ninety (90) days prior to the end of the accounting period.

### Funding Expenses

Funding is accomplished through an annual dues assessment of each chapter representative. All funds received and all expenses incurred shall be recorded separate from Executive Women International and separate bank accounts maintained for this purpose. All expenses incurred should be a reasonable percentage of the total funding received in order to continue to qualify for the tax-exempt status.

### Accounting Procedures

The EWI B/C/DP is designated and funded as a tax-exempt organization under the Internal Revenue Code 501(c)(3), and, therefore, must maintain individual records and reporting information to continue qualifying for the tax-exempt status of this organization.

### Pension Protection Act (PPA)

The PPA of 2006 was put into place in the United States to protect funds distributed through 501(c)(3) charitable organizations from mismanagement and abuse. Our legal counsel provided the following direction as it pertains to our B/C/DP Scholarship Programs.

EWI Corporate and EWI Chapters must be in compliance in the following two areas.

#### 1. Scholarship Selection

- A Selection Committee comprised of individuals associated with EWI as well non-EWI individuals must make the selections of scholarship recipients.
- The majority of the committee's membership must be non-EWI individuals.
- The non-EWI committee members must be appointed for reasons of expertise or community interest. (For example, someone who is active in the community in education, those actively involved in re-training of persons, teachers, professors, deans of colleges, financial advisors, or other expertise would be appropriate choices for the Selection Committee.)
- You can retain your non-EWI members on the Selection Committee from year to year.

#### 2. Investment of B/C/DP Funds

- Each Chapter must also have an Investment Committee to oversee the receipts and disbursements of B/C/DP funds.
- This committee must have the same composition as the Selection Committee, that is, a majority of its members must be non-EWI individuals and, as stated above, be appointed for reasons of expertise or community interest.
- The members of the Selection Committee may serve as the members of the Investment Committee.
- Funds may be placed with/managed by a member firm, but that decision is at the discretion of the Investment Committee.



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### EWI Scholarship Program (EWISP)

#### EWISP Program Description

The Executive Women International Scholarship Program (EWISP) was developed to encourage, motivate and assist high school students pursuing a business or professional career. Open to all high school seniors in public, private or parochial schools with intent to pursue a four-year degree in any business or professional field of study. The process begins in January of each year and continues on an annually culminating at the EWI Leadership Conference and Annual Meeting (LCAM). The EWISP merit/needs based program is limited to high schools within the geographical boundaries of participating EWI Chapters. Applicants must be citizens of the United States.

#### EWISP Calendar-Details

##### September-December

- The Chapter President shall appoint a Chapter EWISP chair and committee to coordinate the Chapter's Executive Women International Scholarship Program (EWISP).
- The Chapter President shall provide a copy of the [B/C/DP Projects Participation Form](#) to the Corporate EWISP Vice Chair and the Corporate Office in accordance with the Dates and Deadlines Calendar.
- The Chapter EWISP chair should:
  - Download and print an adequate supply of B/C/DP marketing materials from the Corporate Website at [ewiconnect.com](http://ewiconnect.com) for distribution to school authorities and students.
  - Prepare a schedule of activities, assign committee members responsibilities and set timetables.
  - Make a list of all local high schools that might participate in the program.
  - Determine the best method of implementing the program in each school system. Initial contact with the schools should be made during this period to explain the program and make them aware that the program has been approved by the National Association of Secondary School Principals and the American Vocational Association. Advise them that information will be sent to them in January.
  - Update the [EWISP Scholarship Application](#) form with Chapter EWISP Chair's contact information and provide to local schools. The application may be downloaded from the "Members Only" section of the EWI Corporate Website at [ewiconnect.com](http://ewiconnect.com).

##### January

- School authorities should be contacted to distribute brochures and scholarship application packets. Chapter EWISP Chair should make a list of the names and phone numbers of every school principal and teacher who will be contacted and with whom the committee will be working.

##### February

- Select and contact three (3) local judges. The judges must represent the educational, business and civic sectors of the community. A judge may be the executive from a member firm. Judges may be the same individuals selected for the either of the two following committees per the EWI Chapter Resource Guide:
  - **EWI B/C/DP Investment Selection Committee**  
**Board Liaison: Chapter Treasurer**  
This committee is comprised of individuals associated with EWI as well as non-EWI individuals and oversees the receipts and disbursements of EWI B/C/DP funds. Members of the Scholarship Selection Committee may serve as members of the EWI B/C/DP Investment Committee.



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### Scholarship Selection Committee

**Board Liaison: Scholarship or EWI B/C/DP Director or other member of the Chapter Board as designated by Chapter President**

This committee is comprised of individuals associated with EWI as well as non-EWI individuals and makes the selections of scholarship recipients. Non-EWI members can be retained from year to year.

- If a conflict should arise whereby a judge is acquainted with one of the students in the competition or is in any other possible situation for a conflict, the judge should excuse themselves from the judging of that particular student. That means student A will be lacking x number of points that judge #1 would have given the applicant. Student A's base would therefore be adjusted and the applicant's standing would be calculated accordingly - rather than a total of 300 points for the application from three (3) judges, the maximum total would be 200; if student A scored a total of 198, the applicant percentage would be 99%. The other students' standings would be calculated against the 300 base (e.g., if a student C scored 295, his/her percentage would be 98%). These same rules would apply for the personal interview.
- Select date and location for judging entries, keeping in mind that the Chapter winner's application **must** be received by the Corporate EWISP Vice Chair in accordance with the Dates and Deadline Calendar.
- The EWI Corporate B/C/DP Chair will contact the Corporate EWISP Vice Chair for assistance in locating three (3) judges for the final judging to take place from May through June. These judges may be from the city where LCAM is to be held or from the city of the Corporate EWISP Vice Chair.

### March

- Chapter EWISP chair sends reminder letters to the school contacts or sponsoring teachers as deadline for entries draws near. It is recommended this be followed with a phone call.
- Download EWISP certificates from the Corporate Website, [ewiconnect.com](http://ewiconnect.com), for participating students.

### April

- In accordance with the Dates and Deadline Calendar, or at earlier date as set by the Chapter, all participating high schools must have submitted the name of their nominee and that student's completed application to the local Chapter EWISP chair. **No pre-screening or judging of applications by Chapters is allowed.**
- In accordance with the Dates and Deadline Calendar, a local panel of judges selects the winning student based on judging the application and a personal face-to-face interview, lasting about 15-20 minutes per interview, with the top three (3) to five (5) students.
- Make a duplicate copy of the winner's application for Chapter records. The Chapter chair should contact the winning applicant. The Chapter should not rely on the school counselor to do so. **Important Note:** Winner's application may not be altered in any way, or the student will be disqualified.
- The Chapter EWISP chair should notify all member firms as soon as a winner is selected and secure a completed [Media Release](#) form from the winner.
- Chapter EWISP chair delivers the completed [Media Release](#) form and the winning application, with three (3) copies, to the Corporate EWISP Vice Chair in accordance with the Dates and Deadline Calendar. Chapter EWISP chair also sends or faxes the [EWISP Notification of Chapter Winner](#) form to the EWI Corporate B/C/DP Chair in accordance with the Dates and Deadline Calendar.

### May

- Make arrangements to present the Chapter winners and sponsoring teachers at a Chapter



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meeting. Advise winners that their awards will be disbursed directly to the college/university they plan to attend.

- Chapter notifies all participating schools of local winners and presents EWI scholarship certificates to their nominees.

### June

- Chapter chair notifies local news media of their winner. A Chapter file should be maintained on the media coverage of local competition and winner. Include a copy of the completed [Media Release](#) form in your records.

### July-August

- Final judging to be completed in accordance with the Dates and Deadline Calendar.
- The Corporate B/C/DP Chair announces the first through third place winners and the five (5) finalists in accordance with the Dates and Deadline Calendar.

## EWISP Program Guidelines

### EWISP Teacher Responsibilities

- Make information available to senior students and encourage students to apply for scholarship.
- Selection of the student to represent school in EWISP should be conducted by the principal, one department head and one other teacher.
- Complete school official's section of Secondary School Report scholarship application and provide certified transcripts of student's academic records.

### EWISP Student Responsibilities

- Prepare application for competition to include:
  - Complete application form including parent's/guardian's signature
  - Biographical questionnaire
  - Autobiographical essay
  - Personal recommendation forms (2)

### EWISP Rules and Regulations

Following are the rules and regulations governing the Executive Women International Scholarship Program (EWISP).

- The following factors will be considered in selecting the winner at all levels of the competition:
  - Scholastic achievement
  - Leadership qualities/personal merit
  - Career goals
  - Extra-curricular activities
  - Communication skills
- Levels of Competition
  - Chapter Competition
    - Chapter judging completed in accordance with the Dates and Deadline Calendar.
    - The winning student or students receive scholarship awards from the local EWI Chapter.
  - Final Competition
    - Applications received in accordance with the Dates & Deadline Calendar.
    - Judging completed by in accordance with the Dates & Deadline Calendar.
    - Judges select first through third place winners and five (5) finalists.
    - The first place scholarship is presented during the EWI B/C/DP luncheon at LCAM.
- Application Certification
  - All applications must be certified as correct by the principal of the applicant's school. The principal's approval for the student and sponsor to attend the EWI LCAM and the



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parent's/legal guardian's approval and release portion of the application must be signed before the applicant can be considered as a local winner.

### EWISP Judging Information

#### EWISP Criteria

The following factors will be considered in selecting the winner at all levels of the competition:

- Financial need
- Completed FAFS form ([www.fafsa.ed.gov](http://www.fafsa.ed.gov))
- Scholastic record
- Scholastic honors and awards received during high school years
- Leadership qualities
- Clearly defined career goals
- Realistic and attainable short-term and long-term goals
- Involvement in extracurricular activities, including awards and honors received
- Communication skills, both written and oral
- Creativity

#### EWISP Judging

- Personal face-to-face interviews will be conducted with the top three (3) to five (5) students at the Chapter level.
- *EWISP Program Application Judging Form* and *EWISP Personal Interview Judging Form* will be provided for both Chapter and final judging. Applications will be judged and scored prior to the local interview. Information from judging forms is NOT to be shared with school authorities or students.
- The interviews should be directed toward verification of the information in the student's applications. Topics are covered in the criteria section. Although specific interview questions are not included for Chapter level competition, the Corporate B/C/DP Liaison may provide sample questions, including current news topics.

#### EWISP Judges Gifts

While some money is budgeted for gifts for the final judges, it is preferable to have the Chapter or a member firm donate the gift. If this is not possible, it is recommended that a \$50 per judge contribution be made to EWISP with the judge naming an individual or company in whose name the contribution is being made.

### Corporate EWISP Vice Chair

#### EWISP Corporate Vice Chair Purpose

Under the guidance of the Corporate Board B/C/DP Liaison and the Corporate EWI B/C/DP Chair, the Corporate EWISP Vice Chair is responsible for coordinating the final judging phase of the EWI Scholarship Program.

#### EWISP Corporate Vice Chair Responsibilities

The Corporate EWISP Vice Chair and the winning Chapter's EWISP chair will receive detailed instructions from the EWI Corporate B/C/DP Liaison and the EWI Corporate B/C/DP Chair for the awards luncheon including head table line up, reserved tables, and distribution of certificates.

- The following are *some* of the EWI Corporate EWISP Vice Chair's responsibilities:
  - Secure three (3) judges from the educational, business, and civic sectors. Utilizing the same criteria for selection of EWI B/C/DP Investment Selection Committees.
  - This committee is comprised of individuals associated with EWI as well as non-EWI individuals and oversees the receipts and disbursements of EWI B/C/DP funds. Members of



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the Scholarship Selection Committee may serve as members of the EWI B/C/DP Investment Committee.

- Receive applications of Chapter winners
- Arrange for judges to review applications and determine the first through third place winners and five (5) finalists
- Coordinate charity donations in judge's names
- Forward one copy of each application, all supporting materials, and all judging records to Corporate Office after judging is completed for records retention

### EWISP Scholarship Administration

#### EWISP Corporate Administration - Scholarship Procedures

- Chapters must submit *EWISP Notification of Chapter Winner* to the Corporate EWISP Vice Chair when the Chapter winner has been decided.
- The Corporate Office and/or other authorized EWI appointed personnel will administer the scholarship funds.
- The student must notify the Corporate Office of the school he/she plans to attend by the designated date.
- Scholarship funds will be disbursed in the year awarded. Checks will be sent directly to the school. If a student must withdraw from school during a quarter or semester, written notification must be made immediately to the EWI B/C/DP Board of Trustees in care of the EWI Corporate Office. EWISP's portion of the tuition refund, if any, is to be sent to the Executive Women International Foundation - EWISP, not the student, in care of the EWI Corporate Office.
- The Corporate Office will contact the financial aid office of the student's school relative to the amount of the scholarship. Prior to the beginning of school, and upon receipt of the *EWISP Enrollment Verification Form* from student, EWI will send a check to the financial aid office.
- The school will notify the EWI Corporate Office that the check has been received for the student.

#### EWISP Corporate Administration - Scholarship Guidelines

- A student must pursue a four-year degree in any business or professional field of study in order to be eligible for the scholarship award. The scholarship award is given to further the student's education and a cash gift may NOT be substituted.
- Students may attend a two-year accredited college as the initial step in the pursuit of a four-year degree or a four-year baccalaureate degree granting institution.
- No scholarship money will be given directly to the students. All monies will be disbursed through the school's financial aid office.
- The student winner must submit grade transcripts each quarter or semester to the EWI Corporate Office.
- To maintain the scholarship, students must maintain a 2.5 grade point average and carry at least twelve (12) credits per semester.
- The maximum availability of the scholarship awards for a full-time student is five (5) years to be paid out in the year they are awarded. Students should begin school at the beginning of the next available school year and from the time the student begins school, the total amount of the scholarship is available for **only the next five (5) years**. The maximum availability of the \$1,000 awards is three (3) years. A student may withdraw from school for one year due to personal illness substantiated by a physician and remain eligible for the full scholarship. Such notification and physician's statement must be furnished to the EWI Corporate Office as soon as possible.
- Other changes in student status (or withdrawal for any other reason) must be requested in writing and sent to the EWI B/C/DP Board of Trustees in care of the EWI Corporate Office as soon as possible. The Board of Trustees will consider the request and respond to the student with its decision in writing in a timely manner. The Board of Trustees reserves the right to nullify the award, if, in the opinion of the Board of Trustees, the reason for withdrawal is not deemed valid.



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- The EWI scholarship is **non-transferable**.
- EWI reserves the right to amend these guidelines to cover any issues deemed appropriate.
- The school and career direction of the winning student must be approved by EWI.
- At the end of three (3) or five (5) years depending on the amount of the, any unused scholarship funds will no longer be available for the student's use and will revert to the EWI scholarship fund administered by Executive Women International.

### EWISP Chapter Administration - Student Awards

- The EWI Chapter shall determine the number and amount of Chapter awards to be given.
- Chapter winners should be honored and awards presented at a meeting of the Chapter membership, with details to be determined by the Chapter.
- All participating students to receive an EWISP certificate.
- Chapter winners should receive a memento recognizing them as a winner.

### EWISP Corporate Administration - Scholarship Award Procedures

- Winning students will receive letter from the Corporate Office (at time of awards) outlining procedures to be followed in order to receive scholarship prior to entering college.
- Student will be sent a verification letter and an enrollment verification form for the student to complete and return to the EWI Chapter. This form should be received by the Chapter in time to meet the deadline(s) in the Dates and Deadline Calendar in order for payment to be made to school in a timely manner. If student receives a national award, the Corporate Office will also send an [EWISP Enrollment Verification Form](#).
- When the student returns the Enrollment Verification Form and transcripts (not available for first semester), the tuition check can be processed. This check is to be sent to the college/university along with a [Tuition Disbursement Letter](#) requesting acknowledgment of the award on behalf of the student.
- A follow-up is suggested in April or May of student's senior year.

### EWISP Retention of Records

Scholarship selection is covered under the Pension Protection Act of 2006. To assure that required tax reporting periods are covered, all scholarship applications and supporting materials, which include judging records, should be retained for a minimum of four (4) years. At the end of the required four-year period, documents should be shredded with the exception of the winner's application, which should be saved permanently to help maintain the historical records of the Chapter.



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### Adults Students in Scholastic Transition Program (ASIST)

#### ASIST Program Description

Executive Women International established the Adult Students in Scholastic Transition (ASIST) Program to provide financial support to adult students in a variety of transitional situations. Executive Women International believes the ASIST Program will enable each recipient to achieve self-esteem and will positively impact the recipient's personal life, employment, family and community.

Awards are provided for the recipients' education and related expenses that would aid them in obtaining the necessary educational skills to help achieve career goals and objectives. Related expenses include tuition, books and mandatory fees from schools, such as lab fees and childcare. Not included are such things as rent, utility payments, travel expense, or repayment of student loans. Checks for Chapter and Corporate scholarship awards are paid directly to the student's college or university and **never** directly to the student alone.

#### ASIST Calendar-Details

##### September-December

- The Chapter President shall appoint a Chapter ASIST chair and committee to coordinate the Chapter's Executive Women International Scholarship Program (ASIST).
- The Chapter President shall provide a copy of the [B/C/DP Projects Participation Form](#) to the Corporate ASIST Vice Chair and the Corporate Office in accordance with the Dates and Deadlines Calendar.
- The Chapter ASIST chair should:
  - Download and print an adequate supply of B/C/DP marketing materials from the Corporate Office for distribution to school authorities and students.
  - Prepare a schedule of activities, assign committee members responsibilities and set timetables.
  - Agencies having facilities to aid adult students in transition will be asked to recommend qualified candidates to the Chapter selection committee. Financial need and clearly defined goals will be a strong determinant in selection of recipient(s).
  - Determine the best method of implementing the program in each system. Initial contact with agencies should be made during this period to explain the program and make them aware that the program has been approved by the National Association of Secondary School Principals and the American Vocational Association. Advise them that information will be sent to them in January.
  - Download and update your Chapter information and provide the [ASIST Scholarship Application](#) to local agencies. The application may be downloaded from the "Members Only" section of the EWI corporate website at [ewiconnect.com](http://ewiconnect.com).

##### January

- School authorities should be contacted to distribute brochures and scholarship application packets. Chapter ASIST Chair should make a list of the names and phone numbers of who will be contacted and with whom the committee will be working.

##### February

- Select and contact three local judges. The judges must represent the educational, business and civic sectors of the community. A judge may be the executive from a member firm. Judges may be the same individuals selected for the either of the two following committees per the EWI Chapter Resource Guide:
  - **EWI B/C/DP Investment Selection Committee**  
**Board Liaison: Chapter Treasurer**  
This committee is comprised of individuals associated with EWI as well as non-EWI individuals and oversees the receipts and disbursements of EWI B/C/DP funds. Members of



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the Scholarship Selection Committee may serve as members of the EWI B/C/DP Investment Committee.

- **Scholarship Selection Committee**  
**Board Liaison: Scholarship or EWI B/C/DP Director or other member of the Chapter Board as designated by Chapter President**

This committee is comprised of individuals associated with EWI as well as non-EWI individuals and makes the selections of scholarship recipients. Non-EWI members can be retained from year to year.

### March

- Chapter ASIST chair sends reminder letters to the agency contacts as deadline for entries draws near. It is recommended this be followed with a phone call.
- Download ASIST certificates from the [ewiconnect.com](http://ewiconnect.com) for participating students.

### April

- April 1 - All participating agencies must have submitted the name of their nominee and that student's completed application to the local Chapter ASIST chair. No pre-screening or judging of applications by Chapters is allowed.
- In accordance with the Dates and Deadline Calendar - Local panel of judges selects the winning student based on judging the application and a personal face-to-face interview, lasting about 15-20 minutes per interview, with the top three (3) to five (5) students.
- Make a duplicate copy of the winner's application for Chapter records. The Chapter chair should contact the winning applicant. The Chapter should not rely on the school counselor to do so.  
**Important Note:** Winner's application may not be altered in any way, or the student will be disqualified.
- The Chapter ASIST chair should notify all member firms as soon as a winner is selected and secure a completed *Media Release* form from the winner.
- Chapter ASIST chair delivers the completed *Media Release* form and the winning application, with three (3) copies, to the Corporate ASIST Vice Chair for arrival to comply with Dates and Deadline Calendar. Chapter ASIST chair also sends or faxes the *ASIST Notification of Chapter Winner Form* to the Corporate B/C/DP Chair in accordance with the Dates and Deadline Calendar.

### May

- Make arrangements to present the Chapter winners and sponsoring teachers at a Chapter meeting. Advise winners that their awards will be disbursed directly to the college/university they plan to attend.
- Chapter notifies all participating schools of local winners and presents EWI scholarship certificates to their nominees.

### June

- Chapter chair notifies local news media of their winner. A Chapter file should be maintained on the media coverage of local competition and winner. Include a copy of the completed *Media Release* form in your records.

### July

- Final judging to be completed in accordance with the Dates and Deadline Calendar
- The Corporate B/C/DP Chair announces the winners in accordance with the Dates and Deadline Calendar.

### August

- **The Chapter ASIST chair will notify the Corporate Office if an ASIST winner will be attending the Leadership Conference and Annual Meeting (LCAM).** The Corporate Office will make the student's flight arrangements and hotel accommodations. The following expenses for up to three (3) days and three (3) nights will be paid by EWI for the student only if travel necessitates more than one (1) day and one (1) night travel time: hotel, meals (not to exceed \$60/day) round-trip coach airfare (most cost effective), transportation to and from the airport in



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home city and LCAM site. Student will be responsible for any expenses incurred, other than those previously stated.

- The Chapter ASIST chair must submit an itemization of all LCAM expenses incurred by the student indicating any expenses paid for by the Chapter. Itemization and supporting invoices should be sent to the Corporate B/C/DP Liaison and the Corporate Office for approval and payment

### ASIST Program Guidelines

#### ASIST Program Chapter Guidelines

- Publicity of the ASIST award(s) will be made to local media, allowing Chapters to receive recognition in their communities.
- Pre-selection criteria may be furnished to the educational provider. Selection criteria includes, but is not limited to, the following:
  - Financial need
  - Socially, physically and economically challenged adults
  - Displaced household with small children

#### ASIST Rules and Regulations

Following are the rules and regulations governing the EWI ASIST scholarship program (ASIST)

- Candidates must live within a participating Chapter's geographical boundaries. Candidates in U.S. Chapters must be 18 years of age.
- Candidates must utilize re-entry programs available through colleges, community agencies and service groups or career professionals.
- Candidates will submit a signed [ASIST Scholarship Application](#) that includes the following:
  - Current and projected educational expenses
  - Response to two essay questions
  - Copy of a completed FAFSA ([www.fafsa.ed.gov](http://www.fafsa.ed.gov))
  - Copy of student aid application (if applicable)
  - Two references – one can be from employer (past/present), teacher/school administrator, sponsor, and second reference can be from church official, volunteer organization or personal acquaintance. These references should focus on the candidate's goals/objectives and potential for success.

### ASIST Judging Information

#### ASIST Criteria

The following factors will be considered in selecting the winner at all levels of the competition:

- Financial need
- Scholastic record
- Scholastic honors and awards received during high school years
- Leadership qualities
- Clearly defined career goals
- Realistic and attainable short-term and long-term goals
- Involvement in extracurricular activities, including awards and honors received
- Communication skills, both written and oral
- Creativity

#### ASIST Judging

- Personal face-to-face interviews will be conducted with the top three (3) to five (5) students at the Chapter level.
- Each selection committee member will be provided with a complete packet of information on



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candidates. Each member of the committee will independently review the materials and complete an [ASIST Scholarship Applicant Evaluation Form](#) with assigned point values. Once each committee member has had an opportunity to review all candidates, the ASIST selection committee will meet as a whole and determine the Chapter's ASIST recipient(s). If any member of the selection committee is affiliated with the applicant or institution, they should thereby remove themselves from the process.

- The interviews should be directed toward verification of the information in the student's applications. Topics are covered in the criteria section. Although specific interview questions are not included for Chapter level competition, the Corporate B/C/DP Liaison may provide sample questions, including current news topics.

### ASIST Judges Gifts

While some money is budgeted for gifts for the final competition judges, it is preferable to have the Chapter or a member firm donate a gift. If this is not possible, it is recommended that a \$50 per judge contribution be made to ASIST with the judge naming an individual or company in whose name the contribution is being made.

## ASIST Vice Chair

### ASIST Vice Chair Purpose

Under the guidance of the Corporate B/C/DP Liaison and the Corporate B/C/DP Chair, the EWI Corporate ASIST Vice Chair is responsible for coordinating the final judging phase of the Corporate ASIST scholarship program.

### ASIST Vice Chair Overview

The Corporate ASIST Vice Chair and the winning Chapter's ASIST chair will receive detailed instructions from the Corporate B/C/DP Liaison and the Corporate B/C/DP Chair for the awards luncheon including head table line up, reserved tables, and distribution of certificates.

- The following are some of the Corporate ASIST Vice Chair's responsibilities:
  - Secure three (3) judges from the educational, business, and civic sectors. Utilizing the same criteria for selection of EWI B/C/DP Investment Selection Committees.
  - Receive applications of Chapter winners
  - Applications must include two (2) letters of reference as to why they think the student is worthy of the award. This reference should focus on the candidate's goals/objectives and potential for success. One reference letter could be from either a past or present employer, or teacher/school administrator. The second reference letter can be from a church official, volunteer organization or personal acquaintance.
  - Arrange for judges to review applications and determine the winners
  - Coordinate charity donations in judge's names
- Judges will be supplied with the ASIST Scholarship Applications and an [ASIST Scholarship Applicant Evaluation Form](#). Chapters should **not submit** the completed [ASIST Scholarship Applicant Evaluation Form](#) used for Chapter judging. The ASIST judges will forward the evaluation form to the Corporate ASIST Chair, who will tally the scores. All ASIST applications should be judged against each other with the winners selected from the highest scores. Verification of the tally must be conducted by an independent party, not necessarily an accounting firm.
- The Corporate ASIST Vice Chair should provide a copy of the tally to the Corporate B/C/DP Chair who will send a copy to the Corporate B/C/DP Liaison, the Corporate Office, the respective Chapter ASIST Chairs or Presidents as notification of the winner.
- Once judging is completed and the winners have been announced, the Corporate ASIST Vice Chair should forward one copy of each application, all supporting materials, and all judging records to the Corporate Office for records retention.



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### ASIST Corporate Administration - Scholarship Procedures

- Chapters must submit *ASIST Notification of Chapter Winner* the Corporate ASIST Vice Chair when the Chapter Winner has been decided.
- The Corporate Office and/or other authorized EWI appointed personnel will administer the scholarship funds.
- The student must notify the Corporate Office of the school he/she plans to attend in accordance with the Dates and Deadline Calendar for the fall semester.
- Checks will be sent directly to the school. If a student must withdraw from school during a quarter or semester, written notification must be made immediately to the EWI B/C/DP Board of Trustees in care of the Corporate Office. ASIST's portion of the tuition refund, if any, is to be sent to the Executive Women International Foundation - ASIST, not the student, in care of the Corporate Office.
- The Corporate Office will contact the financial aid office of the student's school relative to the amount of the scholarship. Prior to the beginning of school, and upon receipt of the *ASIST Enrollment Verification Form* from student.
- The school will notify the Corporate Office that the check has been received for the student.

### ASIST Corporate Administration - Scholarship Guidelines

- A student must pursue a four-year degree in any business or professional field of study in order to be eligible for the scholarship award. The scholarship award is given to further the student's education and a cash gift may **NOT** be substituted.
- Students may attend a two-year accredited college as the initial step in the pursuit of a four-year degree or a four-year baccalaureate degree granting institution.
- No scholarship money will be given directly to the students. All monies will be disbursed through the school's financial aid office.
- To maintain the scholarship, students must maintain a 2.5 grade point average and carry at least twelve (12) credits per semester.
- Other changes in student status (or withdrawal for any other reason) must be requested in writing and sent to the EWI B/C/DP Board of Trustees in care of the EWI Corporate Office as soon as possible. The Board of Trustees will consider the request and respond to the student with its decision in writing in a timely manner. The Board of Trustees reserves the right to nullify the award, if, in the opinion of the Board of Trustees, the reason for withdrawal is not deemed valid.
- The EWI scholarship is **non-transferable**.
- EWI reserves the right to decide any issue not covered in these guidelines and to add to these guidelines when necessary.

### ASIST Chapter Administration - Student Awards

- The Chapter shall determine the number and amount of Chapter awards to be given.
- Chapter winners should be honored and awards presented at a meeting of the Chapter membership, with details to be determined by the Chapter. Checks for Chapter and Corporate scholarship awards are paid directly to the student's college or university and **never** directly to the student.
- All participating students to receive an ASIST certificate.
- Chapter winners should receive a memento recognizing them as a winner.

### ASIST Chapter Administration - Scholarship Award Procedures

- Winning students will receive a letter from the Chapter (at time of awards) outlining procedures to be followed in order to receive scholarship prior to entering college.
- Student will be sent a verification letter and an *ASIST Enrollment Verification Form* for the student to complete and return to the Chapter. This form should be received by the Chapter



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prior to the date in the Dates and Deadline Calendar in order for payment to be made to school in a timely manner.

- When the student returns the Enrollment Verification Form and transcripts (not available for first semester), the tuition check can be processed. This check is to be sent to the college/university along with a [Tuition Disbursement Letter](#) requesting acknowledgment of the award on behalf of the student.

### **ASIST Retention of Records**

Scholarship selection is covered under the Pension Protection Act of 2006. To assure that required tax reporting periods are covered, all scholarship applications and supporting materials, which include judging records, should be retained for a minimum of four (4) years. At the end of the required four-year period, documents should be shredded with the exception of the winner's application, which should be saved permanently to help maintain the historical records of the Chapter.



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### EWI Fellows Program

#### Fellows Program Description

The EWI Fellows Program is a Corporate level program that awards financial assistance to active EWI representatives admitted to accredited baccalaureate, graduate, or post graduate programs. Financial assistance is awarded through the EWI Business/Career/Development Program (B/C/DP), a 501(c)(3) corporation. The Fellows Program supports the EWI B/C/DP mission. Corporate Board Officers and Directors, the Fellows Vice Chair, Fellows Selection Committee, Trustees of the Business/Career/Development Program (B/C/DP), Corporate Staff or any relation to them are ineligible to make application to the Fellows Program.

#### Fellows Calendar-Details

##### January

- The Fellows Vice Chair updates, approves and submits application for changes to the Corporate B/C/DP Chair

##### February

- Fellows Vice Chair prepares and sends information to be included in the *EWIConnect* about Fellows Scholarship opportunities and requirements.

##### April-June

- All participating representatives must have submitted the completed *Fellows Application* to the Fellows Vice Chair in accordance with the Dates and Deadlines Calendar.
- Applications scored by the Selection Committee utilizing the Fellows Applicant Evaluation form.
- Judging to be completed no later than June 15 each year. See *Fellows Judging* section on page 17.
- Make a duplicate copy of the winner's application and submit to the Corporate Office for records retention. The Fellows Vice Chair should contact the winning applicant.
- The Fellows Vice Chair should notify the Corporate B/C/DP Chair who will share with the Corporate B/C/DP Liaison as soon as winners are selected and secure a completed *Media Release* form from the winners.
- Fellows Vice Chair notifies the Corporate Office of the winner.

##### July-August

- The Corporate B/C/DP Chair announces the winners in accordance with the Dates and Deadline Calendar
- The Fellows Vice Chair will notify the Corporate Office if any Fellows winners will be attending the LCAM. All Expenses for Fellows winners to be paid either by the Chapter or by the winner. EWI Corporate will not cover these costs.

#### Fellows Program Guidelines

##### Fellows Rules and Regulations

Fellowships will be given to EWI representatives seeking undergraduate, graduate, and post graduate degrees. The amount and/or number of awards will be determined by the budget and pool of qualified candidates.

If awarded the fellowship, a candidate may re-apply annually and receive an award for up to two (2) years toward their degrees (upon demonstration of satisfactory progress toward receipt of an undergraduate, graduate, or post graduate degree). No applicant will be awarded more than one fellowship in an academic year for a total tenure of not more than two consecutive years. A candidate may re-apply after taking one year off in applying for the Fellows Scholarship.

- The fellowship award may be used for qualified tuition and course related expenses such as



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books, supplies, and fees. It may not be used as payment for previous loans, salaries of awardees, purchase of equipment, attendance at conferences, travel expenses, or professional dues for conferences.

- Awardees must document enrollment before award check is mailed to designated college or university.
- Fellows results will be posted on the EWI Corporate Website at [ewiconnect.com](http://ewiconnect.com).
- Fellows awards must be spent during the fellowship year awarded.
- All unused funds (in USD) must be returned to the Fellows Program at the end of the semester or term if applicable.
- If any violation of Fellows requirements occurs, the Fellows recipient must reimburse all allocated fellowship funds by the deadline determined by the B/C/DP Board of Trustees.

### Fellows Eligibility

The Fellows Program awards undergraduate, graduate, and post graduate fellowships to active EWI representatives based on financial need, demonstrable leadership, and community commitment. Service and commitment to EWI will be a significant measure of leadership and community involvement. At minimum, candidates must be accepted to a college program, but may be currently enrolled and working towards completion of a degree in a field of study designed to enhance their personal and professional development at an accredited institution of higher learning.

- Active EWI membership for three (3) or more consecutive years
- Member in good standing.
- Firm to have paid EWI B/C/DP assessment fee.
- Demonstrated participation in Chapter activities.
- Minimum of five (5) years full-time work experience.
- Commitment to meeting the specific requirements of the Fellows Program as stated on the Acceptance Contract.
- Active membership in EWI during the academic year for which the fellowship is awarded.
- Financial need.

Although potential applicants who fit every requirement listed above are not guaranteed financial assistance, those who do not fit them are ineligible for a fellowship award. Eligibility requirements are subject to change.

### Fellows Student Responsibilities

- Determine whether you meet the program eligibility requirements for the award.
- Read directions and deadlines very carefully before filling out the application.
- Note format requirements/details such as font size, minimum words, and number of copies required.
- Address awards criteria as requested.
- Pay attention to the appearance, spelling, and grammar of the documents.
- Have someone proofread your materials.
- Present a professional package in the order requested.
- Keep hard and disk copies of your application materials.
- Ask questions for clarification by contacting the Corporate Fellows Liaison.

The EWI Fellows Program guidelines have been adapted from current EWI Scholarship Programs, accredited institutions of higher learning, and other professional organizations granting fellowship and scholarship awards.

### Fellows Judging Information



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### Fellows Criteria

- [Fellows Application](#) material can be found online on the EWI Corporation Website at [ewiconnect.com](http://ewiconnect.com). Applicants must submit five (5) complete and assembled hard copies of the application package and ensure receipt in accordance with the Dates and Deadline Calendar to the current Corporate Fellows Vice Chair.
- Applicant Requirements:
  - Submit completed and authenticated verification of enrollment by awardees' college or university along with application in accordance with the Dates and Deadline Calendar.
  - [Fellows Enrollment Verification Form](#), last four (4) digits of Social Security number, (or Canadian equivalent) will be required if awarded.
  - Verify course(s) completed and grade(s) earned upon completion of the term enrolled with the [Fellows Course Grade Verification Form](#)
- Reimburse unused fellowship funds by check or money order (in USD) made payable to EWI B/C/DP and attach reimbursement [Fellows Expense Verification](#) at the end of the fellowship year.
- Send receipts and verification documents to the EWI Corporate Office at: 3680 So. 2300 E., Suite 211, Salt Lake City, Utah 84109.

### Fellows Judging

- Application packages will be forwarded by the Fellows Vice Chair to the Fellows Selection Committee.
- If a Fellows Selection Committee member is a representative of the Chapter of a Fellows applicant or is a relative of a Fellows applicant, the committee member must withdraw from the committee entirely.  
Note: Applicants, those writing recommendations, and others having a conflict of interest may not serve on the Selection Committee.
- The Corporate B/C/DP Liaison will appoint additional members to serve on the Selection Committee as needed. The Selection Committee will review the packages using the [Fellows Application Evaluation](#) form, assign points based on the criteria, and return the evaluation sheets to the Corporate B/C/DP Liaison for tabulation.
- Selection process will be completed within 60 days of application deadline.
- Fellows recipients will be contacted by the date published in the Dates and Deadline Calendar. The Corporate Office will disperse funds to the designated, approved college or university upon receipt of the [Fellows Enrollment Verification Form](#).
- Fellows awards are granted on a competitive basis according to funds available for that fellowship year. All committee deliberations will be confidential and all application materials and supporting documents will become the property of EWI.
- No information on the status of an application will be made available until the conclusion of the process and announcement of the winner(s).

## Fellows Vice Chair

### Fellows Vice Chair Purpose

Under the guidance of the EWI Corporate B/C/DP Liaison and the EWI Corporate B/C/DP Chair and the Fellows Vice Chair is responsible for coordinating the final judging phase of the Fellows Scholarship Program.

### Fellows Vice Chair Responsibilities

- The Fellows Vice Chair will accept applications, confirm that paperwork received is in order, and submit one (1) copy of the required documents to each member of the Fellows Selection Committee. Application package materials include the following:



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- The Fellows Vice Chair will remove names and other identifying information before forwarding the applications to the Selection Committee so the judging will be blind and unbiased.
- Record of Participation and Accomplishments
- Two (2) current letters of recommendation (one (1) from Past Chapter President or a current Chapter President or Board Member; one (1) from an EWI Executive of the applicant or, if applicant also serves as the Executive, then a letter from a client will be acceptable)
- Resume Form/Media Release
- Income/Financial Form
- Enrollment Verification/Form
- College transcript for applicants applying for graduate or post graduate fellowships should be forwarded with the application. An official transcript is defined as “an original transcript with the raised seal of the school, delivered in a sealed envelope.”
- Application fee (\$25 **non-refundable** USD), made payable to EWI, in the form of a check or money order must accompany application.

### Fellows Scholarship Administration

#### Fellows Administration - Scholarship Guidelines

- A fellowship is a monetary scholarship given to an active EWI representative for undergraduate, graduate, or post graduate courses leading to degree completion.
- The number of fellowships given out each year is determined by the funds allotted to the Fellows Program from EWI B/C/DP funds and revenues. If no qualified candidate is identified for a particular fellowship award, then no fellowship will be awarded that year.
- If, before any fellowship award has been disbursed, a fellowship recipient decides not to participate in the indicated undergraduate, graduate, or post graduate course(s) of study, no fellowship funding will be provided.
- If, after a fellowship award has been disbursed, the fellowship recipient decides to discontinue participation in the indicated undergraduate, graduate, or post graduate course(s) of study or violates eligibility requirements, the recipient is required to contact the Corporate Office to reimburse all allocated fellowship funds by the deadline determined by the Trustees of the B/C/DP.
- At the end of each semester or term, the Fellows recipient must submit a [Fellows Expense Verification Form](#) that indicates how the fellowship funds were used.
- The scholarship award is **non-transferable**.
- There is no limit on the number of applicants from a single Chapter, as long as each applicant meets the requirements and pays the application fee.
- Online courses and distance learning programs that are requirements for the selected degree must be from an accredited institution and are acceptable.
- The Fellows Selection Committee reserves the right to determine the quality of the selected accredited educational institution in order to protect the EWI B/C/DP mission to enhance and promote education and professional development.

#### Fellows Retention of Records

After the awards are announced, the Fellows Vice Chair will forward the original copy of each application along with original judging records – including evaluation sheets and tallies – to the Corporate Office where they will be kept for four (4) years to meet retention guidelines. At the end of the four-year period, all documents with the exception of the winners’ applications can be shredded. Winners’ applications are saved permanently to maintain EWI historical archives.



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### International Philanthropy

#### International Philanthropy Program Description

Executive Women International has identified literacy as the international philanthropic initiative to carry out its mission of encouraging community involvement to:

- Promote Name recognition
- Market EWI while devoting time to a worthwhile cause
- Unify all Chapters to focus on one (1) initiative
- Impact a universal problem

#### International Literacy Focus

Annually, EWI hosts a literacy initiative/event aimed at promoting literacy. The campaign encourages EWI volunteers to visit schools, shelters, hospitals and community organizations to promote the joy of reading and the importance of literacy both at the Chapter and Corporate level through Reading Rally events.

#### International Literacy - Chapter Level

- Chapters should research various local agencies and determine the agency or agencies that the Chapter would like to partner with during the year. The organization should be non-profit, charitable or educational in nature.
- Although Chapters are strongly encouraged to participate in the Corporate literacy initiative, they are also encouraged to support local literacy initiatives throughout the year.

#### International Literacy Publicity

Send out press releases describing your local literacy event, emphasizing that the activities are part of EWI's international literacy initiative. Include Chapter's event on the Chapter website.

### International Literacy Calendar - Details

#### November

- Submit [B/C/DP Projects Participation Form](#) (from prior year).
- Submit [Philanthropic B/C/DP Projects-Chapter Annual Report](#) (from last year and anticipated for next year).

#### December-January

- Chapter philanthropy committee researches appropriate organizations where Chapter can participate in literacy project (Reading Rally).

#### February

- Chapter philanthropy committee presents report to Chapter Board for approval.

#### March

- Chapter philanthropy chair presents plans to membership.

#### April-September

- Chapter philanthropy committee finalizes plans for Reading Rally. Refer to [Reading Rally Toolkit](#) resource for ideas/guidance.

#### October

- Chapter participates in Reading Rally.



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### Forms and Exhibits

[IRS Identifying Numbers for B/C/DP and Subordinates](#)

[B/C/DP Projects Participation Form](#)

[Media Release](#)

[Philanthropic B/C/DP Projects-Chapter Annual Report](#)

[Reading Rally Toolkit](#)

[EWISP Scholarship Application](#)

[EWISP Notification of Chapter Winner](#)

[EWISP Program Application Judging Form](#)

[EWISP Personal Interview Judging Form](#)

[EWISP Enrollment Verification Form](#)

[Tuition Disbursement Letter](#)

[ASIST Scholarship Application](#)

[ASIST Notification of Chapter Winner Form](#)

[ASIST Scholarship Applicant Evaluation Form](#)

[ASIST Enrollment Verification Form](#)

[Fellows Application](#)

[Fellows Application Evaluation](#)

[Fellows Enrollment Verification Form](#)

[Fellows Course Grade Verification Form](#)

[Fellows Expense Verification](#)