

# Zeta Phi Beta Sorority, Inc.

## Sigma Kappa Zeta Chapter

Brooklyn, New York



### Modus Operandi

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# *Zeta Phi Beta Sorority, Inc.*

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# *Zeta Phi Beta Sorority, Inc.*

## **Introduction and Purpose**

The SKZ Modus Operandi was created to provide The Chapter with a description and a framework of the tasks necessary to effectively fulfill the duties of respective SKZ offices. Adherence to these procedures should also facilitate the ongoing development of our chapter. Officers are encouraged to periodically review the information contained within in order to assess for revisions or modifications of proposed tasks. This SKZ Modus Operandi should also be used as a training aid that can be referred to by Sorors who wish to obtain an understanding of specific duties and responsibilities in a variety of areas. Any officer who refuses to uphold the Modus Operandi and/or Constitution will be removed from her position.

# Membership Modus Operandi

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## **Membership Protocol**

### **Foreword:**

As an active and financial member of Sigma Kappa Zeta Chapter it is important for members to be involved in all aspects of the Membership Selection/Intake Process for admitting potential Sorors into the Sorority.

Through the chapter's active involvement, chapter members will:

- *Identify* potential members
- *Determine* to whom invitations are extended to attend the Membership Invitational Program
- *Vote* on the approval of the applications
- *Be present* at the interview, training and education process
- *Participate* in the ceremonial rituals
- *Provide* bonding opportunities between newly admitted members and the chapter

Our chapter will continue to grow through the years because of the love and dedication of its members. Always remember that you are only as strong as your weakest link.

### **Purpose**

The purpose of this Membership Committee Handbook is to provide a guideline for effective functioning of the Membership Committee activities, as they relate to membership intake procedures for Zeta Phi Beta Sorority, Inc., Sigma Kappa Zeta Chapter. Specifically, it will guide the Chapter in operating according to official procedures and provide guidance in each phase of the process.

This handbook should be under constant revision from the Membership Committee, based on our National Constitution and By-laws and the needs of the chapter. Sigma Kappa Zeta Chapter membership committee shall adhere to all parts of the current Membership Intake guidelines, as set forth by our National Headquarters.

### **Focus**

Chapter alternate membership focus between transfer/reclaimed sorors and new intake each year.

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## **Membership Intake Process Overview**

### ***Informational***

An invitation to an informational shall be given to any candidate who expresses an interest in the Sorority. The informational is a program where candidates will be given information about the Sorority and the chapter. The membership committee shall arrange for the informational to take place for either the spring or fall of the fiscal Sorority year.

The attire for Sorors for an informational and/or invitational shall be business suit or Sunday attire, representing Finer Womanhood and professionalism. Zeta colors are recommended.

### ***Observation***

The observation period is an ongoing process chapters use to identify prospective members. There is no specific time during the year for an observation period. Sorors should observe potential women in their community or general association for possible membership.

A Soror who recommends a candidate shall be known as the candidate's sponsor. A candidate who a Soror sponsors should possess characteristics and credentials necessary for recommendation of membership into Zeta Phi Beta Sorority, Inc. High regard shall be given to a candidate who a Soror sponsors. The sponsor is responsible for inviting a candidate to chapter functions. Attendance at a chapter function gives the entire chapter an opportunity to meet a candidate. Furthermore, it provides a candidate with an opportunity to understand the dedication that Zeta requires and for the candidate to observe the true sisterhood Sorors exhibit.

If a Soror does not know a candidate, the candidate shall be considered under observation once they submit a letter of interest and/or attend a chapter event. The membership committee shall invite a candidate to all chapter service projects and fundraiser events. Candidates should receive a personal phone call, email or a mailed invitation to chapter functions. US mail should be the standard form of operation for all correspondence. Candidates should be contacted no less than fourteen days in advance for any chapter function.

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## ***Invitational***

Similar to an Informational, the Membership Invitational Program is the chapter's opportunity to introduce and highlight the history and projects of Zeta Phi Beta Sorority, Inc, on the local and national level. The membership committee only submits names of women who have met the minimum observation criteria for invitation to the Invitational program. A formal membership invitation is given to selected women. Their acceptance and participation in the Membership Invitational Program indicates their interests in learning more about Zeta Phi Beta Sorority, Inc. and applying for membership in the Sigma Kappa Zeta Chapter.

At the conclusion of the Membership Invitational Program, women are invited to submit a letter of their interest in membership to the Sorority. Potential members must submit a letter of interest, a notarized proof of degree. . Interviews and Selection

Once the Membership Committee verifies the letter of interest, and degree, an interview should be scheduled.

All financial, active members and MIP Certified members of the chapter shall interview a candidate. The chapter interviewing process should solicit additional information about the aspirant, increase the aspirant interest and establish a rapport between the aspirant and the Sorors. The interview should not be an inquisition or intimidating process. Questions should be asked to reveal information that includes, but is not limited community service, special talents and skills; reasons for interest in Zeta; strengths the candidate will bring to the Sorority. In addition, the Sorors should ask why the candidate did not join membership of an undergraduate chapter and have they submitted an application to another Zeta chapter or Pan-Hellenic council sorority (see Appendix A). .

After the interviews are complete, a lengthy detailed discussion should take place regarding all candidates. Discussions should focus on highlighting candidate's strengths and limitations. Subsequently, the chapter shall vote by secret ballot to determine if the potential aspirant is eligible for membership. Candidates eligible for membership will require a majority vote, a quorum being present, from all active/financial members for a candidate to be eligible as a potential aspirant. If a candidate is chosen to be a potential aspirant, she will be sent a written invitation to apply for membership, no more than seven days after the interview. If a candidate fails to meet the minimum requirement, the membership committee will send the candidate a rejection letter and encourage the candidate to attend additional Sigma Kappa Zeta chapter community service functions. The membership committee shall encourage candidates to submit again next year.

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To avoid liability, candidates should not be given the exact reason they were not accepted for membership (see Appendix J). It should never be the intention of the Sorors to reject a candidate based on superficial reasons. Therefore rejection of the candidate must have a solid foundation in fact. Incomplete application, falsifying information, poor character reference, inability to identify strengths they can bring to the Sorority, and inability to meet financial commitment are examples of reason for rejection.

## ***Initiation***

Following the interview, The Membership Committee Chair will notify potential aspirants of acceptance by mail. At that time, aspirants are asked if they wish to continue with the application process. For those who answer in the affirmative, the chapter must provide a membership kit. This membership kit must be completed within two days. The membership chair will forward information, (minus fees) next day mail to the State Director for approval. The cost for express mail postage should be included in the membership assessment to be forwarded to International Headquarters. The first Ritual Ceremony will be performed once all documents are returned and the Membership Committee Chair receives clearance from the National First Anti-Basileus. The chapter will not have any official contact with the aspirants until approval has been received from the National First Anti-Basileus. Upon approval of the aspirant's application for membership of the National First Anti-Basileus, the aspirants will attend five (5) educational workshops. The second Ritual Ceremony will be performed once the aspirant satisfactorily completes the course of study provided in the educational workshops.

**Embellishment for Neophytes, Reclaimed and Transfer Sorors** Embellishment is an on-going process by which bonding occurs. During this period, it is important for new Soror's original sponsor the membership committee to assist her transition into the chapter. The committee and the new Soror's sponsor are to help the neophyte understand the workings of her organization. Seminars may be planned and conducted to provide numerous and varied stimulating activities over a three to six week period so that neophytes can be motivated to become more knowledgeable about governing policies, procedures, etc. Accordingly, the new members will be able to adjust to the Greek-lettered Society, and subsequently, render future service to the Sorority and the community.

**The following topics should be included and discussed in detail:**

1. Official duties and responsibilities of the chapter

*A. Members*

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- B. Committees
  - C. Officers
  - D. Fundraising
2. Rules and regulations of the Parliamentarian and other officers
    - A. Chapter constitution
    - B. National constitution
    - C. Regional constitution
    - D. NYS constitution
  3. Protocol
    - A. Zeta operating procedures
  4. Interaction amongst other Greeks
  5. Understandings and experiences of being a member of an undergraduate chapter (for reclaimed or transfer Sorors only)

**Leadership classes or workshops on Zeta Techniques should be conducted on the following:**

1. How to conduct meetings
2. Robert's Rules of Order (newly revised, latest edition)
3. How to take minutes and give reports
4. Researching potential projects
5. Conflict management and resolution
6. Event planning and fundraising

At the end of the workshop, new Sorors should be assigned to their sponsor or a "seasoned" Soror to assist in the new Soror's acclimation in the chapter. New Sorors are encouraged to fully participate in chapter committees and all other Sorority activities. All Sorors should make ALL new Sorors feel welcome.

### ***Candidate Referral***

Any financial/active Sigma Kappa Zeta Soror, affiliate group member and/or Sigma may submit the name of a prospective candidate for membership into the Sorority. The name of shall be given to the membership committee. If there is no committee, the name is

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given to the secretary. The membership committee shall invite the prospect to an informational or chapter function.

**Women who are recommended for membership must meet the following minimum criteria:**

- Demonstrates an interest in becoming a member of Zeta Phi Beta

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## Sorority, Inc.

- Possesses a Baccalaureate degree from an accredited four- (4) year college.
- Demonstrates an interest and/ or involvement in community and service activities.
- Willingness to give their time and financial commitments.
- Illustrates activity in religious, community and/ or professional organizations.
- Possesses a cooperative spirit and can work with others to achieve a common goal.
- Mature in thinking, behavior, and attitude (acceptable personal character)
- High moral reputation in the community, representative of a Finer-woman.
- Attends a minimum of five (5) Sigma Kappa Zeta community service functions & three (3) fund-raisers.
- Association to the Zeta Family (Zeta relatives, Amicae, Youth Auxiliary, Sigma relatives)

### **The following information will be especially helpful to the Sigma Kappa Zeta Chapter Membership Committee. (See applicant pre- application)**

- Personal information, hobbies
- Reasons for wanting to be a part of a Sorority, with a clear description of their idea of Sorority life.
- Reasons for wanting to become a part of Zeta Phi Beta Sorority Inc., with particular emphasis on events and experiences that have influenced the candidate's decision to apply.
- The specific strengths that the candidate would bring to the Sorority.
- Family background, skills, abilities, affiliations or interests
- Academic/Professional affiliation, membership in organizations
- Extracurricular activities, special committee work, special awards, citations, etc
- Updated Résumé, volunteerism, community service

In short, potential candidates must exemplify the ideals of Zeta Phi Beta Sorority, Incorporated, and must be rendering services in their respective communities.

### **Sigma Kappa Zeta Chapter, Membership Committee Responsibilities**

Sponsors are encouraged to attend all Membership Committee meetings and assist in guiding aspirant through the application process. The Chairperson is the First-Anti Basileus of the chapter.

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## **The Membership Committee Responsibilities**

- Investigate candidates for active membership to verify background and determine the candidate's character and readiness.
- Establish dates and times for membership application activities and notify membership.
- Receive all Member Referral Forms for prospective members (see Appendix A)
- Confirm candidate interest by requesting a formal Letter of Interest (see Appendix B)
- Send letters of invitation to an informational and give a list of chapter events to prospective candidates (see Appendix C)
- Collaborate with community service and fundraising committees to verify candidates' attendance (see Appendix D)
- Prepare the informational agenda (see Appendix F)
- Distribute questionnaires at the end of the informational (see Appendix G)
- Present the candidate profile(s) to the chapter.
- Send letters of invitation to the invitational to those who complete the minimum criteria. (Formal invitations are used for this event)
- Present the candidate profile(s) to the chapter for final review.
- Send letters for interviews to those who complete the minimum criteria and the chapter has voted upon for membership. (attending 5-chapter events/program & 2 fundraiser, see Appendix D)
- Schedule and oversee the interview and voting process.
- Send decision letters out with dates, application fees, (The cost for the chapter folder/binder is included in the fee of new members)
  - and when they are due back to the chapter P. O. Box (see Appendixes I and J)
- Order membership supplies and prepare applications, forms and appropriate fees to be sent to Nationals (see Appendix K)
- Oversee that Ritual 1 and 2 are performed according to the National Handbook.
- Plan embellishment workshop for new, transfer or reclaimed members (i.e., constitution, meetings, etc).
- Introduce new, transfer or reclaimed Sorors to all committees and have new Sorors select committees which they desire involvement with.

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- Develop member profile
- Plan all chapter rituals, ceremonies and Circle of Sisterhood functions
- Ensure that women not following through with their interest in membership should not be invited to our chapter and community service project and events.
- Ensure that each chapter members must be in compliance with MIP certification. Sorors who do not have proof of MIP certification must attend another MIP certification workshop in order to obtain verification of their certification
- Annual Observation Period for new-intake members is one calendar year.
- Chapter allows women to join a particular observation period for up to three (3) months after the formal observation period began.
- Ensure that two or more sorors must be present, whenever meeting with an interest.
- Share the responsibility with MIP certified committee members of contacting interests transfer and reclaimed.
- Ensure that each interest who contacts SKZ is assigned a “MIP Certified buddy,” who would be responsible for having weekly contact with the interest and inviting interest to upcoming SKZ events.

## **Sigma Kappa Zeta Chapter, Membership Application Process Time-line**

### **Informational / Embellishment**

Time frame: April/May/June

Candidate(s) are mailed an invitation to a Sigma Kappa Zeta Chapter Informational were they will receive a listing of our events for the Sorority year.

Required Items:

1. Informational Agenda
2. Chapter Events Calendar and Contact Information
3. Ice Breaker

Reason:

The candidate(s) will have a formal introduction to the Sorority as well as an invitation to participate in Zeta functions. Sorors are given the opportunity to meet and observe candidate(s) in formal and informal settings.

### **Invitational/Interviews**

Time-frame: September/October

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- Candidate(s) are mailed an invitation to a Sigma Kappa Zeta Chapter Invitational.
- Candidate(s) are mailed a letter inviting them to an Interview Session.
- Chapter members will vote on which candidate they would like to invite into the Sorority/Chapter.

Required Items:

1. Invitational Agenda
2. Chapter Events Calendar and Contact Information

Reason: Chapter members should feel comfortable making a decision based on all information gathered and interaction with the candidate(s) over the past year.

## **Initiation**

Time-frame: November/ December

- Decision letters are sent out along with applications and notification of when application fees are due. Note: Committee has two weeks to return all paperwork.
- Once all paperwork is returned, a letter should be sent informing the candidate of the date, place, time and attire for the intake ceremony.
- Place all gift orders.

Required Items:

- Membership packets
- Initiation Items (Flowers, candles, candle sticks, Bible, copies of ceremony, aspirant pins)

**The following are guidelines set by Nationals once we have selected potential aspirant(s).**

As of Day 1 the candidate(s) will be known as Aspirant(s).

- Start paperwork Day 1
- First Ceremony Day 5 – 14
- Educational Sessions Day 15 – 20
- Second Ceremony Day 21

## **Transfer or Reclaimed Sorors**

A Soror who expresses an interest in becoming a member of Sigma Kappa Zeta Chapter must be in good standing (transfer card) and provide proof of membership in Zeta Phi Beta Sorority, Inc. prior to attending any meeting or ceremony. A membership card, certificate, transfer card or notarized letter from a graduate chapter or financial

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Soror is the only forms of acceptable verification. All transfer or reclaimed Sorors who have paid Sigma Kappa Zeta Chapter and National Dues are entitled to receive a Sigma Kappa Zeta Chapter Workbook. A newly reclaimed or transfer Soror shall receive her Sigma Kappa Zeta Chapter Workbook, no later than seven days after her funds (dues) are made available to the chapter. Please note that the chapter includes the price of the chapter folder/binder in the dues of incoming transfer/reclaimed sorors. Workbooks should be readily available for Sorors who pay in cash or money order. The chapter must provide incoming Sorors who have not paid in full their dues with the Chapter's Constitution and Roster until deemed financial, The membership committee will provide the Embellishment Guidelines workshop to all Sorors who transfer or reclaim. These workshops are used to inform a Soror of Sigma Kappa Zeta Chapter operations and member responsibilities. The committee will tailor workshop guidelines, according to a Soror's knowledge. If a Soror joins during a month that a workshop is not being conducted, she will be assigned to a "seasoned" Soror to help ease her transition into the chapter until the next scheduled workshop. Incoming Sorors must have a meeting with the Basileus, 1st Anti-Basileus, 2nd Anti-Basileus and 3rd Anti-Basileus to discuss chapter's expectations. All transfer or reclaimed Sorors should be made to feel welcome by Sigma Kappa Zeta Chapter members.

Sorors should extend genuine sisterly greetings to all transfer or reclaimed Sorors in an effort to become better acquainted with your new chapter Soror.

## **Visiting Sorors**

It is important that Sigma Kappa Zeta Chapter extend sisterly greetings to all Sorors who are searching for a chapter to gain membership. The membership committee shall send a correspondence to a visiting Soror, thanking her for attending, inviting her to a chapter function and extending her membership into the chapter. Correspondence shall be sent, no more than seven days from the visiting Sorors attendance at a chapter meeting. A member from the Membership Committee will give a visiting Soror a welcome packet. The welcome packet will include a visiting Soror questionnaire, meeting evaluation, listing of fees, welcome letter, chapter mission and vision, brochure, member profile and

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calendar of events.

Transfer of Membership A transfer will be issued to a Soror upon written notice of request for transfer to another chapter, presentation of a transfer Reference card from current chapter and the required fee(s) to the office of the Executive Director mailed by the chapter where she seeks affiliation. A Soror must be financial with the National, Regional and Local levels of the Sorority before she will be transferred to another chapter. If non-financial, she must reinstate with Nationals and pay all financial obligations including transfer fees, before she can transfer. Sigma Kappa Zeta is to exercise discretion, within constitutional guidelines, as to how often a financial Soror may transfer from a local chapter to another chapter of close proximity in the same region. No Soror may hold membership in more than one Chapter at a time.

Sigma Kappa Zeta requires all reclaimed and transfer Sorors seeking membership in the Chapter in the month of May through August 31st of each Sorority year pay their National, Regional, and State governance to be applied to the subsequent sorority year to be paid prior to or during the annual Chapter retreat.

All reclaimed and transfer Sorors who have paid State, Regional, and National dues in the months of May through August 31st be invited to the Chapter retreat for the current sorority year

## **Suggested Attire for Zeta Activities**

Each Zeta should have the following items on hand. There will always be an occasion when they are needed.

1. White blouse 4. Black dress 7. White Shoes 2. Royal Blue business suit 5. Semi-Formal black, 8. Black Shoes. 3. Pure white dress 6. Z Phi B Stole silver, white and/or

## **Meetings:**

1. State meetings Business (Royal Blue, Black, or White)

• Regional/Boule/National conferences Workshops Business casual (Royal Blue, Black, or White)

Business sessions Business (Royal Blue, Black, or White)

Breakfasts/Luncheons Business casual (Royal Blue, Black, or White)

## **Events/Affairs:**

Local chapter meetings Business/Business casual Meetings of affiliate orgs. (e.g. NPHC) Business casual Workshops Business/Business casual (Royal Blue, Black, or White) Service Projects/Youth Aux. Meetings Paraphernalia/Casual (Zeta Colors) Luncheons/Finer Womanhood Programs Royal Blue, Black or White business or semi-formal Dinner Dances/Banquets Semi-Formal/Formal Balls Formal Chapter

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Informational/Teas Business (Royal Blue or White)

## **Ceremonies:**

1. Installation of officers: Business casual
2. \*Rededication Uninterrupted pure white dress or suit  
with official sorority pin
3. \*Initiation of new members Uninterrupted pure white dress or suit  
with official sorority pin
  - a. New interim members Uninterrupted pure white dress and shoes
  - b. New Initiates Uninterrupted pure white dress and shoes
4. \*\*Burial services Black dress, White ribbon under official  
Pin and black shoes

**\*MANDATORY ATTIRE: Off white, eggshell, ivory or cream is unacceptable. There should be no trim or accents in another color on the dress. See official handbook for more details. \*\*MANDATORY ATTIRE: See official handbook for more details.**

Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter 10/03 Adapted from Sigma Nu  
Zeta Chapter Suggested Attire Guidelines

# *Zeta Phi Beta Sorority, Inc.*

## **Candidate Evaluation Form**

**Please complete this scale based on the question: How well does the candidate meet the following criteria? T**

HE SCALE RANGES FROM POOR/DOES NOT MEET CRITERIA---- EXCEPTIONAL.

A. THE CANDIDATE DEMONSTRATES AN INTEREST IN BECOMING A MEMBER OF

**ZETA PHI BETA SORORITY, INC. 1 2 3 4 5 Poor/Does not Barely met Fair Good  
Exceptional MEET CRITERIA CRITERIA**

B. The candidate possesses a Baccalaureate degree from an accredited four (4) year college. (Any candidate with a Bachelor's degree will automatically get a 5 in this category)

1 2 3 4 5

C. THE CANDIDATE DEMONSTRATES AN INTEREST AND/OR INVOLVEMENT IN COMMUNITY AND SERVICE ACTIVITIES.

1 2 3 4 5

D. T

HE CANDIDATE IS WILLING TO GIVE THEIR TIME AND FINANCIAL COMMITMENTS

.

1 2 3 4 5

E. T

HE CANDIDATE ILLUSTRATES ACTIVITY IN RELIGIOUS

,

COMMUNITY

,

AND

/

OR PROFESSIONAL

ORGANIZATIONS.

1 2 3 4 5

F. THE CANDIDATE POSSESSES A COOPERATIVE SPIRIT AND CAN WORK WITH OTHERS TO ACHIEVE A COMMON GOAL

.

1 2 3 4 5

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G. T

HE CANDIDATE IS MATURE IN THINKING

,

BEHAVIOR

,

AND ATTITUDE

(

CHARACTER)

1 2 3 4 5 H. T

HE CANDIDATE IS REPRESENTATIVE OF A FINER WOMAN

(

COMMUNITY)

1 2 3 4 5

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ACCEPTABLE PERSONAL

HIGH MORAL REPUTATION IN THE

# Zeta Phi Beta Sorority, Inc.

I. THE CANDIDATE HAS ATTENDED A MINIMUM OF FIVE (5) SIGMA KAPPA ZETA CHAPTER COMMUNITY SERVICE FUNCTIONS AND TWO

(2)

FUNDRAISERS

.

1 2 3 4 5

J. T

HE CANDIDATE HAS AN ASSOCIATION TO THE

, AMICAE, YOUTH

AUXILIARY) ANY CANDIDATE WITH AN ASSOCIATION TO THE ZETA FAMILY WILL AUTOMATICALLY GET A

Z

ETA FAMILY

(Z

ETA RELATIVES

**5**

**IN THIS CATEGORY**

1 2 3 4 5

K. I FORSEE THIS CANDIDATE MAKING A POSITIVE CONTRIBUTION TO SIGMA KAPPA Z

ETA

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HAPTER

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HER EXPERIENCE AND PROFESSION CAN ADD TO IMPROVING SIGMA KAPPA ZETA CHAPTER FUNCTIONING AND PROGRAMMATIC DEVELOPMENT)

1 2 3 4 5

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REATED BY

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# *Zeta Phi Beta Sorority, Inc.*

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CHAPTER

## **SKZ “Buddy Program” Suggested Guidelines**

1. Buddies must contact one another at least 2x monthly 2. “Seasoned” SKZ chapter Sorors should cover the following areas with their buddy.

A. Have them to submit a bio to the webmistress and membership chair

B. Review the chapter mission and vision

C. Have them submit their contact info. Including birthday and crossing date to the sunshine chair and grammateus.

D. Review calendar of events and their responsibilities as members E. Inform them that they have to be active in at least one committee F. Review the chapter constitution and bylaws G. Inform them what committees are active and the functions of those

committees H. Discuss how to correctly make a basic motion I. Review standard operating procedures for the chapter (who to go to

to get things done) J. Inform them of the community service and fundraising incentives K. Encourage them to review their Robert’s Rules of Order L. Review membership handbook M. Make certain they have “everything” in their workbook (List of “everything” to be provided to all Sorors by the membership committee) N. Review the

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Circle of Sisterhood and its purpose O. Remind them to submit a copy of their MIP certification to the

membership chair P. Remind them that part of the culture of SKZ chapter is that “everyone must be informed about everything” 3. Buddies should initially meet one on one and face to face in an informal setting in order to begin the bonding process. 4. At least once during the sorority year buddies should attend a chapter function together in order to continue to facilitate bonding.

## Created by Sigma Kappa Zeta Chapter October 2003 MEMBERSHIP FAQ

Q: I know a woman who I believe will be an asset to our organization. What

do I do? A: Review your SKZ membership handbook for information on referring a woman for membership. If you have any further questions contact the membership committee.

Q: A Soror I know is interested in joining Sigma Kappa Zeta Chapter. What

do I do? A: Review your SKZ membership handbook for information on referring a Soror to the chapter. If you have any further questions contact the Membership committee.

Q: Can I talk with women about how to become a member of Sigma Kappa

Zeta Chapter? A: You can provide general information about our organization and our chapter, fill out the referral form on their behalf, and refer them to the membership committee.

Q: Sigma Kappa Zeta Chapter has begun formal observation of potential

Aspirants. Can I present someone for observation? A: You can always present someone for observation, however, if she is presented more than 3 months after the start of the observation period she cannot be considered as a candidate for membership for that period.

Q: Can I tell an aspirant that she is under observation? A: No. In order for the chapter to have the clearest possible picture of

The aspirants’ character and intentions, they should not be told they are under observation.

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Q: I have not been certified in the Membership Intake Process (MIP) can I

Participate in new member selection and intake? A: According to our MIP guidelines, only certified members who are financial and a member of a financial chapter can participate in membership selection and intake.

Q: I have not been certified in the MIP. How can I obtain my certification? A: Unless there is a specific MIP training held you will have to register for a state, regional, or national conference and attend an MIP workshop.

Q: I am a transfer/reclaimed member to Sigma Kappa Zeta chapter. When do I obtain my chapter workbook?

A: If you have paid your dues in full by money order or cash, you will receive your workbook the day you pay your dues. If you pay in full by check, you will receive your workbook within 7 days after your check clears. If you pay your dues in installments; you will receive your workbook once your dues are paid in full within 7 days after your check clears for your final payment.

Q: What is the Sigma Kappa Zeta “Buddy Program”? What are the

responsibilities of the buddies? A: The SKZ “Buddy program” was created in order to acclimate new

members to the chapter and build relationships within the chapter. The responsibilities of the buddies are outlined in the buddy program guidelines (can be obtained from the membership chair).

Q: What is the Circle of Sisterhood? What is my responsibility as hostess? A: The Circle of Sisterhood is a monthly chapter get-together at which members can interact socially and reinforce our sisterly bond. The Circle of Sisterhood is held on the last Friday of the month. The responsibilities of the hostess are to plan and inform Sorors of the activity.

Q: I would like to transfer into SKZ chapter. What do I need to do? A: You need to attend chapter meetings and chapter events in order to determine whether the chapter is a good fit for you. Once you have determined that you want to join the chapter, obtain a transfer card from your chapter and present it to the membership chair.

Q: I don't have a transfer card. How can I get one? A: Your former chapter should provide you with a transfer card.

Q: My former chapter is no longer in existence. How do I obtain a transfer

Card? A: You can contact your former advising chapter (which should have a record of the undergraduate members they advised) and request a transfer card. If you have

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any further problems, speak with the SKZ membership chair.

Q: What are the expectations of SKZ chapter for Sorors new to the

chapter? A: At the very least, Sorors new to SKZ chapter are expected to join and be an active member of at least one committee, participate in chapter fundraisers, community service events, and ZHOPE activities, attend conferences and meetings when necessary, exemplify the ideals of the sorority, and maintain the status of a financial member in good standing.=

Q: What is the meaning behind the annual chapter theme? A: The chapter theme is Nsaa, which is an Adinkra symbol that means

Extolling Excellence and Discouraging Satisfaction with the Second Rate. The purpose of the annual theme is to provide the chapter with a guiding principle for the year.

Q: Who do I speak with if I have more membership questions? A: The 1st Anti-Basileus is also the chair of the Membership committee. You

can call her at 866-841-9139 x 1674 or e-mail her at [sigmakappazeta@onebox.com](mailto:sigmakappazeta@onebox.com) .

Created by Sigma Kappa Zeta Chapter October 2003

## **Visiting Soror Membership FAQ**

Q: I am a transfer/reclaimed member to Sigma Kappa Zeta chapter. When

do I obtain my chapter workbook? A: If you have paid your dues in full by money order or cash, you will receive your workbook the day you pay your dues. If you pay in full by check, you will receive your workbook within 7 days after your check clears. If you pay your dues in installments; you will receive your workbook once your dues are paid in full within 7 days after your check clears for your final payment.

Q: What is the Sigma Kappa Zeta “Buddy Program”? What are the

responsibilities of the buddies? A: The SKZ “Buddy program” was created in order to acclimate new

members to the chapter and build relationships within the chapter. The responsibilities of the buddies are outlined in the buddy program guidelines (can be obtained from the membership chair).

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## **Appendix A**

### **Sigma Kappa Zeta Chapter New Member Referral Form**

A Soror who refers a candidate must submit this form to any member of the Membership committee. Consideration will only be given to applicants who have the completion of this form on file. Notification will be given to the referring Soror regarding the candidate's membership status. Please attach candidate's résumé to this form.

DATE: \_\_\_\_\_

Name of Candidate: \_\_\_\_\_

Address \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

How do you know this person?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How long have you known this person? \_\_\_\_\_

List the strengths that this potential candidate would bring to the Sorority?

List the candidates' community service and professional affiliations

Soror's Information I hereby recommend the above candidate for consideration for membership into Zeta Phi Beta Sorority Inc. This candidate expresses an interest in becoming a member of our illustrious organization, exemplifies the ideals of Zeta Phi Beta Sorority and renders service in her respective community.

Soror's name \_\_\_\_\_ Soror's signature \_\_\_\_\_

# Formal Letter of Interest Request

# **Sigma Kappa Zeta Calendar of Events**

Appendix D

## Potential Member Checklist

- Candidates Name
- Referral Source
- Potential New Member Checklist
- A. Date received \_\_\_\_\_
- B. Information Complete? YES NO

If no, please contact \_\_\_\_\_ for completion of form. Date Referral Source contacted to verify receipt of completed form.

- Referral Source letter
- A. Referral Source letter sent? \_\_\_\_\_ YES \_\_\_\_\_ NO
- B. Date sent
- C. Chapter Calendar of Events included? YES \_\_\_\_\_ NO
- Attendance at Chapter functions
- 1. Informational YES NO
- 2. Founders Day YES NO
- 3. List Date & Community Service Events that candidate has attended:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- Was correspondence sent to candidates for all events? If not, why?
- 4. List all Fundraiser events the candidate has attended:

\_\_\_\_\_

# Zeta Phi Beta Sorority, Inc.

- 
- Was correspondence sent to candidates for all events? If not, why?

- 
5. Based on the above information, should candidate be invited to an Invitational?

Briefly explain.

---

6. Interviews

\_\_\_\_\_ Receipt date of interest letter \_\_\_\_\_ Date of Interview

7. Membership

A. Is a quorum of active, financial Sorors present at the interview to cast the deciding vote on this candidate? If no, Sorors cannot vote on candidate's membership. \_\_\_\_\_ YES \_\_\_\_\_ NO

- B. Should candidate be considered for membership?

\_\_\_\_\_ YES \_\_\_\_\_ NO

- Date offer letter sent \_\_\_\_\_ Date rejection letter sent \_\_\_\_\_

- Deadline for affirmative reply

8. Information for Nationals

Date of Receipt of Membership Packet / Date completed?

- New Initiates money received / Date Initiation Items ordered

9. Sigma Kappa Zeta procedures

Date gift ordered Date of Workshop

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## **Appendix E**

### **Suggested planning sub-committee for Invitational and Informational**

A. **Budget Committee-** establishes the budget limitations for the membership program based on available funds and donations from Sorors.

B. **Invitation Committee-** is responsible for mailing the special invitations to pre-selected candidates. Invitations should be sent ten (10) days prior to the designated date of the invitational program. This committee will design informational invitations for informationals and order professionally printed invitations, available through national headquarters, for invitationals. All invitations should be professional and include RSVP date, contact person, time and place. The standard method for sending out all invitations should be the US Postal System.

C. **Refreshment and Entertainment Committee-** is responsible for the selection and display of refreshment and the variety of entertainment. The array of refreshments should be a light repast with paper products reflecting the Sorority's colors. The entertainment should incorporate talented Sorors and "Ice Breaker" games.

D. **Decorations/ Hospitality/Amenities Committee-** is responsible for the decorum of the room, printed programs, dissemination and collection of questionnaires, special gifts and party favors. The room and gifts should be appealing and reflective of the Sorority's colors.

E. **Program Committee-** responsible for securing a church or private meeting room for the program, program format and design, editing and making copies for guests. (See suggested program format) The membership committee should choose a day where all members of the chapter can be in attendance, for example, directly after a chapter meeting.

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## **Appendix F**

### **Sigma Kappa Zeta Chapter Informational**

Welcome & Purpose -----	Chapter Basileus
Invocation -----	Parliamentarian
Introduction of Guest (Ice Breaker) -----	Chapter First Anti-Basileus
History of Zeta Phi Beta Sorority Inc. -----	Epistoleus
Chapter Activities & Expectations (Service) -----	Second Anti-Basileus
(Fundraiser) -----	Third Anti-Basileus
Ice Breaker -----	Membership Committee
Question & Answer -----	First Anti- Basileus
Introduction of Sorors & Positions -----	First Anti-Basileus
Sorority Hymn -----	ALL SORORS
Closing Remarks -----	Chapter Basileus

### **Refreshment and Social Hour**

Don't forget to complete the questionnaire

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**Appendix G**

**Sigma Kappa Zeta Chapter Questionnaire/Info Sheet**

Date: \_\_\_\_\_

Full Name: \_\_\_\_\_

Permanent Address: \_\_\_\_\_

\_\_\_\_\_

Telephone Number : \_\_\_\_\_ (Home) \_\_\_\_\_  
(Work)

Email: \_\_\_\_\_

Occupation: \_\_\_\_\_

Employer: \_\_\_\_\_

College(s) Attended \_\_\_\_\_

Degrees Received \_\_\_\_\_

Organization Affiliations (Include positions held)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Community Involvement

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Honors, Awards, Recognitions

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ Please  
return questionnaire to any member of Sigma Kappa Zeta Chapter or mail completed  
form to:

# *Zeta Phi Beta Sorority, Inc.*

## **Appendix H**

### **Thank You Letter**

[Date]

Recipient's Address

Dear [Recipient]

The members of Sigma Kappa Zeta Chapter of Zeta Phi Beta Sorority Inc. appreciate your attendance at our Fall/ Spring Informational. We hope we fulfilled your desire in learning more about our beloved Sorority and chapter.

Sigma Kappa Zeta chapter is looking for a few dynamic women who understand the importance of serving the community and exemplify the ideals of Zeta Phi Beta Sorority Inc. We invite you to join us in our altruistic endeavors by participating in our chapter programs.

Enclosed you will find a list of our chapter events. We encourage your participation in fostering our chapters, 2002 programmatic thrust, "Meeting the needs of Brooklyn's Women and Children". As a women's organization, we empathize with the daily demands that this population has to face. With your help, we can help combat some of their daily barriers and be a force for change in our community.

But we are not only about work, come out and join us for our Sassy Salsa Night and Sinful Soul Skate party to see our more playful side. Come and see what sisterhood is truly about.

If you have any questions, please do not hesitate to contact Soror ZPB at 718- 555-1920.

Sincerely,

Soror ZPB First Anti Basileus

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**Appendix I**

**Congratulatory Letter**

# *Zeta Phi Beta Sorority, Inc.*

## **Appendix J**

### **Rejection Letter**

[Date]

Recipient's Address:

Dear Recipient:

Thank you for submitting your résumé and application for consideration of membership into Zeta Phi Beta Sorority Incorporated, Sigma Kappa Zeta Chapter. We have carefully reviewed the materials you sent us. Due to the outstanding quality of applicants, making a decision has been difficult.

Although your background and experience are impressive, unfortunately we are unable to extend an invitation for membership at this time.

We will however keep your application on file for consideration in next year's intake process. We encourage you to continue attending our community service projects and we thank you for your interest in Zeta Phi Beta Sorority Inc. Best wishes and keep in touch; we'd love to hear about your progress.

Sincerely,

Soror ZPB First Anti-Basileus

**Appendix K**  
**Intake Fees**

# Zeta Phi Beta Sorority, Inc.

## Appendix L

### Visiting Soror Questionnaire

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

### Initiation Information

\_\_\_\_\_ Initiation Date \_\_\_\_\_ Chapter

\_\_\_\_\_ City/State \_\_\_\_\_ School/University

\_\_\_\_\_ City/State \_\_\_\_\_ Membership Number

Please list your talents and skills (check all that apply)

\_\_\_ Website Development \_\_\_ Writing/Editing \_\_\_ Working with Youth \_\_\_ Parliamentary

Procedures \_\_\_ Fundraising \_\_\_ Accounting \_\_\_ Public Relations \_\_\_ Arts/Crafts

\_\_\_ Other: \_\_\_\_\_

### Chapter Experience

Are you currently active in a chapter? \_\_\_ Yes \_\_\_ No If yes, what chapter?

\_\_\_\_\_

If no, what are some of the reasons for your inactive status?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please list any positions that you have held during your tenure as a member of Zeta Phi Beta Sorority, Inc.

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What are some of your reasons for seeking membership into Sigma Kappa Zeta Chapter?

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What are some things that we can do to help you in your transition into the Sigma Kappa Zeta Chapter?

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In general, what do you feel is the biggest strength of an effective chapter?

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---

---

---

---

In general, what do you feel is the biggest weakness of a chapter?

---

---

---

---

---

---

# *Zeta Phi Beta Sorority, Inc.*

## **CHAPTER MEETING EVALUATION**

Thank you for attending a Sigma Kappa Zeta Chapter meeting. We are always striving towards perfection but realize that we may need some improvement. Please help us to improve our chapter meetings by completing this evaluation form.

---

Please rate the overall meeting:

**Strongly Disagree Agree Strongly Disagree Agree**

The meeting started on time. 1 2 3 4

Chapter members conducted themselves 1 2 3 4 in a sisterly manner.

Chapter members agreed to disagree 1 2 3 4

Chapter members made me feel welcome. 1 2 3 4

Chapter members gave informative committee reports. 1 2 3 4

Chapter followed parliamentary procedures. 1 2 3 4

The meeting ended on time. 1 2 3 4

What did you like most about our meeting?

What did you like least about our meeting?

Comments:

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# Community Service Modus Operandi

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## **COMMUNITY SERVICE PROTOCOL**

1. All potential community service projects must be presented first to the community service chair or cochair for review and investigation.
2. All projects are then brought to the community service committee at the monthly community service meetings
3. All projects will be voted upon by the community service committee to decide whether or not they should be brought to the chapter for a vote.
4. Projects that are agreed upon by the committee will then be presented at the next chapter meeting.
5. At the next chapter meeting all financial members will vote as to whether the chapter will take part in that service project.
6. The Community Service Chair is responsible for keeping a monthly tally of the names of all community service projects that a SKZ Sorors attends.
7. Monthly tallies will be included in the community service minutes disseminated to the chapter.
8. SKZ will impose a \$15 assessment for Sorors who sign up/register for a project and don't attend. Sorors must notify the Chair within 48 hours of the event or have an emergency. Assessments to be added to the Community Service budget.
9. Any member who attends the most community service project will be presented with a Zeta jacket or Zeta Afghan that does not exceed \$45 by the community service chair at the last chapter meeting of the year.
10. Sorors' participation in Z-HOPE activities should be included when determining the winner of the community service incentive.

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# Fundraising Modus Operandi

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# *Zeta Phi Beta Sorority, Inc.*

## **FUNDRAISING PROTOCOL**

1. That the Chapter mandates each Soror to purchase ONE ticket to each paid event hosted by the Chapter. \*\* Paid Event is defined as an event hosted by the chapter which has an admission fee.
2. That all ticket sales must be handed over to the Chair or co-chair TWO (2) Weeks prior to each paid event.
3. That any Soror requiring assistance selling her tickets must send an email to the Chair/co-chair within two (2) Weeks after dissemination of tickets.
4. That the Chapter assess the cost of three (3) tickets or \$100.00 whichever lesser to the assigned Sorors' Chapter dues, if she fails to comply with the fundraising protocols.
5. Accept the Barnes & Nobles wrapping fundraiser as an ongoing fundraising event.
6. Each Soror will be required to advise (ex. Letter email text message; or fax) the chair two (2) weeks (after dissemination of tickets) if she is unable to sell her tickets.
7. Fundraising chair shall be required to provide to the Tamias-Grammateus an accounting of total tickets sold by Chapter members for each fundraising event at the Chapter meeting immediately following each fundraising event.

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# Grammateus Modus Operandi Protocol

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## **Grammateus Protocol**

### **1. Order of Business or Agenda**

The Grammateus will prepare a SKZ Standard Order of Business or Agenda for each Chapter Meeting to be disseminated to the general body via email the two days (Friday) prior to the Chapter meeting. The Grammateus must receive via email any additional/special sections and/or headings to be added to SKZ Standard Order of Business or Agenda five days (Wednesday) prior to Chapter Meeting from the Basileus.

### **2. Minutes**

A draft of all minutes of the preceding Chapter Meeting will be forwarded to the general body via email one (1) week prior to the next noticed/scheduled Chapter Meeting.

Any member of the general body has a right to examine the minutes of the Chapter and will be given the opportunity to do so upon request at a reasonable time and place, but this privilege must not be abused to the annoyance of the Grammateus.

### **3. Committee Reports**

All Committee Report to be presented at the Chapter Meeting must be submitted to the Grammateus via email one (1) week prior to said meeting via email.

#### **a. Calendar Development**

All Committee Report must include a list of all new events and/or activities not previously submitted including details (this should include date, time, venue and brief description of the event/activity) updating all current/upcoming event and/or activities already on the calendar for the Sorority year as the information becomes available.

### **4. Membership Roster**

Each member will be require to advise the Grammateus via email of any change in the following vital information within one (1) week of said change:

a. Name Change b. Address

b. Address d. Telephone Number Email Address

5. Adopt a phone tree based on the Chapter Roster for emergency communications

6. Chapter revise the Grammateus Protocol in the Chapter Modus Operandi to include that all committee reports with the exception of the Basileus, Tamias, Tamias-Grammateus, and Phylacter must b submitted utilizing the Committee Report Template.

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# *Zeta Phi Beta Sorority, Inc.*

**ZETA PHI BETA SORORITY, INC. SIGMA KAPPA ZETA CHAPTER**

[CLICK HERE AND TYPE NAME] DATE: 12/18/2006 COMMITTEE MEETING HELD?  
[CLICK HERE AND TYPE NAME]

SORORS PRESENT: [CLICK HERE AND TYPE SUBJECT]

**DATE OF COMMITTEE MEETING: [CLICK HERE AND TYPE NAME]**

**Background:**

**Implementation Plan**

Goals:

Objectives:

Personnel:

Space, Materials, Logistics:

Finances/Budget:

Time:

Impact:

Rationale/Recommendations:

**Evaluation of previous undertakings:**

**Upcoming events:**

**Next scheduled meeting:**

### **Committee Report Writing**

Background The report should succinctly and objectively give needed background on the nature of the project or program and related matters. Appropriate documentation should be given. If there is a large amount of material as a result of the committee's work, often this material is best summarized briefly in the report.

#### **By whom should the report be prepared?**

Usually a member of the committee (often the chair or a recorder, but it could be anyone) prepares a draft of the report. All members of the committee should be given opportunity to review and revise the draft before it is submitted. It is not the drafter's work product, but the product of the entire committee.

### **Implementation**

The report should give a detailed presentation of the implementation plan and budget. An implementation plan includes such things as:

1. Goals and objectives Goals point to the qualitative ideals or values the solution supports. Objectives are the statement of particular activities which, if achieved, result in the accomplishment of the goals.
2. Statement of personnel From goals and objectives, we derive particular tasks that can be done by particular individuals. Reports should make clear what people will be assigned to which tasks and task roles.
3. Space, materials, and logistics The proposal must make clear what resources are needed, including facilities, communications, computers, telephone, mailing, advertisement, etc.
4. Finances and budget The costs of the program (personnel, materials, mailing, gasoline, etc.) should be clearly and accurately projected. If possible, the plan should also indicate the source of funds.
5. Time.

The report should project a timetable for the accomplishment of the various objectives and tasks to facilitate the operation of the plan. Who is to do what by when?

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6. Impact Proposals are more likely to be approved if the Chapter has a clear idea of how to tell if the investment of time and money was worth it. Explain how to evaluate the success of the program. Specify who will be affected or inconvenienced by the new program, and how they will be affected or inconvenienced.

**Rationale** The report should make an argued defense of the proposed solution, generally including (1) how the plan will meet the need; (2) why the plan is desirable; and (3) why the plan has advantages and fewer disadvantages compared to any alternatives, including doing nothing.

**Recommendation** The report should clearly present a request for the Chapter to take some action on the work of the committee. For example, if the committee's function is largely advisory, then the report should request that the committee be informed of actions or decisions on the matters covered in the report. If the committee's role was to provide information, then the request might be that the receipt of the information be acknowledged. If the committee's role was decision-making or action-taking, then the request should be for feedback to guide future work.

**Evaluation** The report should outline the outcome of previous action items undertaken by the committee and provide a conclusion regarding whether the committee met its previously identified goals for the success of the undertaking. **Conclusion** To conclude, bear in mind that your report is a vehicle for conveying information and it should pay attention to the qualities of good information being:

- relevance;
- accuracy (of information as well as spelling and grammar);
- reliability;
- timeliness;
- appropriateness; and
- Cost-effectiveness.

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# Tamias

# Modus Operandi

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# *Zeta Phi Beta Sorority, Inc.*

## **Financial Protocols Manual**

### **Introduction**

#### **Structure and Use of the Manual**

The purpose of this manual is to describe and document recommended procedures to be followed by the Chapter in order to safeguard assets and to maintain financial integrity. These procedures are intended to encourage the efficient use of resources and to aid in maintaining adequate internal controls over assets, liabilities, revenues and expenses. Adherence to these procedures should also facilitate the production of timely and accurate financial reports for use by the organization. This manual is also to be used as a training aid that can be referred to by sorors to obtain an understanding of specific duties and responsibilities in a variety of areas.

#### **Manual Revisions and Updates**

This manual should be maintained in a loose-leaf binder to facilitate the update of the information by the removal and insertion of pages. Instructions will be attached to all additions and revisions to the manual specifying the pages to be removed or inserted. The effective date listed at the bottom of each page represents the date the revision is effective.

## **BUDGETING AND FUNDS MANAGEMENT**

### **Individual Performing Procedure**

**Protocol Objective:** Budgets represent a tool to assist the chapter in meeting short-range plans for general operations, long-range goals such as capital projects, and other plans for specific projects or programs. Funds management procedures are also critical to the budgeting process.

Protocol

- 1. The Budget Committee shall be chaired by the Tamias, and co-chaired by the Tamias-Grammateus.**
- 2. Each committee is required to submit a proposal of events and projected costs they intend to present to the Chapter for implementation for the current sorority year at the Chapter's Annual Retreat.**
- 3. Projected costs should be actual quotes received from vendors,** obtained from catalogues or based on actual research conducted by the committee (i.e. – verbal estimates “obtained from Ms./Mr. T at XYZ, organization”) and should be presented to the Budget Committee in writing.
4. In the absence of “3.” above, the Budget Committee will accept a written estimate based on actual events that were held in during the previous sorority year.
5. From information obtained in “2., 3., & 4.” above, the Budget Committee chairperson shall prepare the budget for the upcoming fiscal year based upon the income and expenditures of the previous year, and giving consideration to new requests and the anticipated/projected activities.
6. The Budget Committee will present the proposed budget at the Chapter's annual retreat for discussion and revision. The Budget Committee will continue to meet as often as is necessary to satisfy itself that all Chapter obligations and planned events are incorporated into the budget AND the projected receipts of the Chapter are either equal to or more than the projected disbursements, the budget will be forwarded to the Chapter for approval at the September chapter meeting.
7. The budget should be presented by the Budget Committee chairperson at the September chapter meeting.
8. When the budget is approved, the Tamias and Tamias-Grammateus will use the budget as the standard against which to monitor expenditures made from each line item.
9. The approved budget is NOT an authorization to disburse funds. Prior

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authorization of EACH disbursement is required from the Chapter before any disbursements are made. Authorization to disburse funds will be given by the Chapter via a carried motion that includes the budgeted line item's description and amount approved for disbursement.

a. Disbursements for payment of National, Regional, and State

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dues do not require pre-approval by the Chapter. b. Disbursements for routine operating expenses incurred by the

Chapter and submitted directly from third-party service providers (i.e. – bills from maintenance of P.O. Box, website, monthly banking fees, etc) does not require pre-approval by the Chapter. c. The Tamias or other authorized agent should take care in the disbursement of such expenses, exercising due diligence to ascertain amounts remitted:

i) Are properly budgeted for (revised budget may be

necessary); ii) Are reasonably accurate (if last month's bill was \$10 and this month is \$30 complete some research and ensure the Chapter in fact owes that money); iii) Are from actual creditors of the Chapter (do not pay a bill

for services/from a provider we are unfamiliar with). d. The Chapter will be given immediate notice of any disbursements made for items described in 6a. & 6b. of this section.

10. Any expenditure that will go beyond the approved budget balances will have to be brought to the attention of and approved by the Chapter.

11. Disposable cameras are not eligible for reimbursement.

12. Receipts are required for any gifts/cards purchased. The receipt must indicate the recipient for which the gift/card was purchased and the event for which it was purchased. Petty Cash Protocol

13. The Tamias will have a maximum of \$200 in petty cash. This is in the event a committee needs immediate funding. In order to receive petty cash, requestor must adhere to Funds Disbursement Protocols, noting exception will be made for the timing of disbursement upon approval.

14. Any discrepancies about financial matters must be submitted in writing to the Budget Committee or the Executive Board.

### Monitoring Procedures

15. The Budget Committee will conduct annual audits. In addition to auditing budgets submitted for chapter activities by periodically reviewing expenditures and comparing them to the budget accepted by the Chapter.

## CHECK POLICY

### Individual Performing Procedure

Protocol Objective: To safeguard the Chapter's assets by minimizing the amount of fees charged to Sigma Kappa Zeta Chapter as a result of bounced checks and reduce the risk of fraud associated with outstanding checks.

Protocol

1. Accept cash, checks, and money orders for the financial

transactions of the chapter. 2. When accepting checks record the name, address check

number and amount of the check in the appropriate ledgers. If the check is not from a soror of the chapter, note the contact person, phone number and e-mail address.

Returned Checks

3. If the bank returns a check, the Tamias will write a letter to

the account holder requesting the face value of the check and a \$25 fee to cover the expenses incurred as a result of the bounced check. The payment should be made in

cash or by money order. 4. The Tamias will record the name of the person/organization on the chapter's Bounced Check List for that fiscal year. 5. The Bounced Check List will be shared with the Tamias

Grammateus to ensure that checks are not accepted from the people/organizations on the list. 6. The individual/organization that has bounced the check will

have to complete future transactions in cash or by money order as long as they remain on the list. 7. Individuals/organizations may be kept on the list for up to one

year. Outstanding Checks

8. If a check is not presented to the bank by the chapter

meeting immediately following its disbursement, the Tamias will contact the payee via e-mail or phone, to inquire of the check's disposition. 9. If the check has been lost or stolen the Tamias will

immediately place a stop payment request on the check.

a. The original payee will be required to submit a second Fund Request Form, however, a second approval from the Chapter will not be needed

10. If the payee intends to deposit the check, the Tamias will continue to follow-up with the payee until such event occurs.

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ZΦB ΣKZ

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# *Zeta Phi Beta Sorority, Inc.*

## **DUES & COLLECTION POLICY**

### **Individual Performing Procedure**

Control Objective: To ensure the efficient collection of the operating funds of the chapter and to maintain the organization's ability to meet its financial obligations. 1. The Chapter will approve the Chapter dues payment structure

during the first chapter meeting of the sorority year. 2. The portion of Chapter dues which are allocated for National,

Regional, and State dues is payable to the Chapter by October 1 unless alternative arrangements have been made with the Tamias. 3. Dues remitted after the October 1st deadline, must be remitted

in the form of cash or money order. 4. A late fee of \$15 will be assessed on each soror who has not

paid their National dues by October 1 regardless of whether alternative arrangements have been made with the Tamias. A late fee of \$15 will be assessed collectively on all sorors who have not paid their Regional and State dues by October 1 regardless of whether alternative arrangements have been made with the Tamias. 5. Chapter dues are payable to the Chapter in full by the October meeting unless alternative arrangements are made with the Tamias. 6. The Tamias will remit National, Regional, and State dues to the

respective Tamias-Grammateus of each aforementioned sorority governance level within 5 business days of the October 1st deadline. 7. The Tamias must obtain from the

1

st  
Anti-Basileus the transfer cards of all transferring and reclaiming sorors, and remit aforementioned documentation simultaneously with National, Regional and State dues. 8. Records will be kept of all funds paid and due for each soror of

the chapter. 9. Reduce Chapter dues by 1/2 for the first year that a "new graduate" Soror comes into the Chapter, Un-financial Status 1) Un-financial Status will be deemed as a soror who has not paid her dues nor has the soror made alternative arrangements with the Tamias or if the soror is in arrears with money owed to the Chapter. 2) Un-financial sorors will not be permitted to make motions or vote

on any matters brought before the body. 3) To facilitate enforcement of "2)" above during the roll call of financial sorors, the Tamias-Grammateus will distribute voting cards to only those sorors whose names are called.

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# *Zeta Phi Beta Sorority, Inc.*

## **FUNDS RECEIPTS**

### **Individual Performing Procedure**

Objective: To ensure that all funds collected are recorded accurately, and in sufficient detail in the accounting books and records of the Chapter. To ensure funds collected are properly deposited to the Chapter's bank account.

#### **General Protocol 1. Sorors will submit funds directly to the Tamias-**

Grammateus ONLY, and ONLY during chapter meetings. 2. In the event that funds must be accepted outside of a regularly scheduled chapter meeting, funds will ONLY be accepted if both the Tamias- Grammateus and Tamias are involved and present during the transaction. 3. In the event that either the Tamias-Grammateus or the Tamias are not available, the involvement and presence of the Basileus and/or the First-Anti-Basileus during the transaction will suffice. 4. Adherence to this procedure will ensure proper recordation of your submissions to the records, as well as, establish appropriate accountability surrounding the safekeeping of your funds.

Protocol for Tamias Grammateus 1. The Tamias-Grammateus and the Grammateus will record all

payments made to the Chapter. 2. The Tamias-Grammateus will record the details of all

remittances to the Cash Receipt Journal. Details must include the following:

a) Date received b) Check/money order number or an indication that cash

was received c) First and last name of payer d) Purpose of funds e) Amount of funds received f) Receipt number remitted g) Date check/money order cleared at the bank, an

indication that cash was deposited, or an indication that funds have not yet been deposited ("In-Transit") 3. The Tamias Grammateus will remit all funds to the Tamias. 4.

The Tamias-Grammateus will obtain a receipt from the Tamias

and retain in her records. Protocol for Tamias 5. The Tamias will accept all payments made to the Chapter from

the Tamias-Grammateus. 6. The Tamias will provide a receipt for each payment to the

Tamias- Grammateus for her records. 7. The Tamias will keep a list of all receipts and restrictively

## *Zeta Phi Beta Sorority, Inc.*

endorse checks "For Deposit Only". The Tamias will deposit all funds to the Chapter's bank account as soon is practicable. 9. The Tamias will obtain a deposit slip from bank and retain in her records.

# *Zeta Phi Beta Sorority, Inc.*

## **FUNDS DISBURSEMENTS (Requestor) Individual Performing Procedure**

Objective: To ensure that funds disbursements are authorized and properly requested and recorded in the accounting records of the Chapter. Protocol for Requestor For Pre-Funds (this procedure is waived for amounts less than \$75) 1. Obtain quote.

Quote should be in the form of: a. Actual quote from vendor (preferable) b. Completed order form from catalogue, Internet, store, etc. c. Soror prepared break down of what the funds will cover amount

for each item and the grand total requested (last resort). 2. Cross-reference requested amount to line item on budget and approval by the

Chapter to ensure request does not exceed amount remaining and approved. 3. If amount exceeds amount remaining budgeted line item, you must submit a written modified budget to the Tamias for approval by the Chapter. 4. Complete Fund Request Form and submit to the Tamias- Grammateus by the 1

st

of the month prior to the actual chapter meeting. a. If request is submitted after the deadline, the request, if approved will be honored at the following chapter meeting. 5. Upon expenditure of funds provided obtain a receipt and remit to Tamias Grammateus for the Chapter's records. For Refunds 1. Cross-reference requested amount to line item on budget and approval by the Chapter to ensure request does not exceed amount remaining and approved. 2. If amount exceeds amount remaining budgeted line item, you must submit a written modified budget to the Tamias for approval by the Chapter.

3. Complete Fund Request Form, attach receipt(s) and submit to the Tamias-Grammateus by the 1st of the month prior to the actual chapter meeting.

# *Zeta Phi Beta Sorority, Inc.*

## **FUNDS DISBURSEMENTS (Tamias-Grammateus) Individual Performing Procedure**

Objective: To ensure that funds disbursements are authorized and properly requested and recorded in the accounting records of the Chapter.

Protocol for Tamias Grammateus

1. Obtain original Fund Request Form from Chapter soror. 2. Ensure all information has been completed and receipt(s) or

quote(s) are provided. a. If receipt is unavailable at time of request, the soror's name should be added to the list of individuals owing receipts for funds disbursed. 3.

Cross-reference requested amount to line item on budget and

approval by the Chapter to ensure request does not exceed amount remaining and approved. 4. The Tamias-Grammateus and the Grammateus will record all

disbursements made by the Chapter. 5. The Tamias-Grammateus will record the details of all

disbursements to the Cash Disbursement Journal. Details must include the following: a.

Date disbursed b. Check number or an indication that petty cash was disbursed c. First

and last name of payee d. Purpose of funds e. Amount of funds disbursed f. Date

disbursement was approved by the Chapter g. Date check cleared the bank 6. The

Tamias-Grammateus will remit all Fund Request Forms to

the Tamias for payment. 7. The Tamias-Grammateus will obtain a check draft from the

Tamias and remit to the original requestor.

# *Zeta Phi Beta Sorority, Inc.*

## **FUNDS DISBURSEMENTS (Tamias) Individual Performing Procedure**

Objective: To ensure that funds disbursements are authorized and properly requested and recorded in the accounting records of the Chapter.

Protocol for Tamias 1. Make all disbursements primarily by check. 2. Checks should be pre-numbered in numerical sequence.

a. Issue checks in numerical sequence only. b. For checks drawn in error, stamp “void” on the checks and save them for reference.

c. The Tamias will store checks not being used in a secure space. 3. Prepare checks from information obtained from original Fund Request Forms and Receipts (if available) – All checks should be supported by original invoices or other source documents. 4. For checks written:

a. Never sign blank checks. b. Never sign checks made payable to bearer.

c. Checks that are voided should be defaced and retained 5. Two signatures are required for all checks.

a. Notify banks to update signature whenever there is a change

in authorized check signatories. b. Authorized check signatories will include the Basileus, 1st Anti- Basileus, 2nd Anti-Basileus, and the Tamias. 6. Neither the Tamias nor any other authorized signatories shall draw a check draft for which (on the day the check is drawn) there are insufficient funds to cover same in the Chapter’s bank account. 7. Obtain original Fund Request Form from Tamias-Grammateus. 8. Ensure all information has been completed and receipt(s) or quote(s) are provided. 9.

Cross-reference requested amount to line item on budget and approval by the Chapter to ensure request does not exceed amount remaining and approved. 10. Complete separate check drafts for each disbursement request to ensure the accuracy of the budgeted amounts. 11. Remit to the Tamias-Grammateus for payment to the original requestor.

# *Zeta Phi Beta Sorority, Inc.*

## **AMOUNTS OWED TO THE CHAPTER**

### **Individual Performing Procedure**

Objective: To ensure that disbursements made to or on behalf of sorors are appropriately recorded and collected.

- 1) Any disbursements made to or on behalf of any soror are due at the chapter meeting immediately following the meeting during which the disbursement is made, unless alternative arrangements have been made with the Tamias. Alternative Arrangements
- 2) Alternative Arrangements will be deemed as a written plan of re-

payment defined by the owing soror which details the following: a. installment dates  
b. amount promised at the specified dates c. if multiple amounts are outstanding, purpose for the particular

remittance (i.e. – if a soror owes \$100 for dues and \$ 96 for bus ride tickets and promises to pay \$50 on a specified date, she must specify whether that amount is for dues or the bus ride.) d. total amount of installment payments promised which equals total

amount owed to the Chapter. 3) Any two missed installments of an Alternative Arrangement will constitute a soror being un-financial. 4) After four missed installments of an Alternative Arrangement the Chapter will be presented with a request to “write-off” remaining balance owed by the soror.

a. Writing off over due balances merely requires removing that portion of the soror’s balance that was figured into the budget as an Expected Cash Receipt. 5) The total installment period defined by the owing soror cannot exceed two (2) months from the date the item was disbursed by the Chapter on behalf of the soror or due to the Chapter from the soror.

For example: If the Chapter prepays on Jan 15, 100% of the hotel and registration for a delegate to attend a conference, that soror should reimburse the Chapter for the portion she is responsible at the Chapter meeting following the check’s issuance Feb. 15th. If the soror needs to make alternative arrangement her repayment plan cannot exceed two months Mar. 15

th

, from the date the check was issued on behalf of the soror – Jan 15.

If the Chapter has a fundraiser where all proceeds are due on Jan 15, a soror will be allowed to establish alternative arrangements that extend

only until Mar. 15.

Extensions on the above deadline will only be granted upon specific approval by the

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Chapter. 6) If the Chapter writes off any amounts for any soror, that soror will not

## *Zeta Phi Beta Sorority, Inc.*

be allowed to become financial in subsequent years until amounts written off are re-paid in full. 7) If the Chapter writes off any amounts for any soror, that soror will not be issued a transfer card to another chapter until amounts written off are re-paid in full. 8) Upon payment in full of all amounts owed to the Chapter, a soror will automatically revert to being financial.

## **FINANCIAL REPORTS**

### **Individual Performing Procedure**

Objective: To ensure financial information provided to the Chapter is accurate, complete and useful for purposes needed.

Protocol - Form and Content of Financial Reports Each financial report will be submitted to the Grammateus seven days prior to the next scheduled chapter meeting for submission to the Chapter.

Each financial report will include the following: 1) A book reconciliation in the following form:

a. Balance reported in financial report of previous chapter meeting; b. Add: Total Funds Received since the latest financial report; c. Less: Total Funds Disbursed since the latest financial report; d. Add/Less: Any reconciling items with sufficient explanations;

and e. Ending Chapter Book Balance (this amount should match ending balance on

the Bank Reconciliation) 2) A listing of all funds received since the latest financial report in the following detail: a. Date received; b. Check/money order number or an indication that cash was

received; c. First and last name of payer; d. Purpose of funds; e. Amount of funds received; f. Receipt number remitted to payer; and g. Date check/money order cleared at the bank, an indication that

cash was deposited, or an indication that funds have not yet been deposited ("In-Transit"). 3) A listing of all funds disbursed since the latest financial report in the following detail: a. Date disbursed; b. Check number or an indication that petty cash was disbursed; c. First and last name of payee; d. Purpose of funds; e. Amount of funds disbursed; f. Date disbursement was approved by the Chapter; and g. Date check cleared the bank. 4) A bank reconciliation in the following form:

a. Beginning bank balance as noted in document described 1)

above;

## *Zeta Phi Beta Sorority, Inc.*

b. Add: Total Funds Received since bank statement date; c. Less: Total Funds Disbursed since bank statement date; d. Add/Less: Any reconciling items with sufficient explanations;

and e. Ending Chapter Book Balance (this amount should match ending balance on

Book Reconciliation) 5) A copy of the first page of the Chapter's latest bank statement available that discloses the effective closing date and the effective closing balance as of that date. 6) A listing of all Amounts Owed to the Chapter for dues, fines imposed, proceeds from tickets for events, and any other fees paid on a soror's behalf. 7) A listing of all sorors who owe receipts for funds disbursed. 8) An updated budget which provides the following information (for each line item and in total):

b. Original amount budgeted; c. Less: Amounts expended to date; d. Less: Amounts earmarked for basic chapter operations; and e. Amount available for requisition/disbursement. 9) A listing of all fund requests submitted (via the Fund Request Forms) for distribution during the chapter for in which the financial report is being presented. 10) Any additional pertinent information pertaining to the Chapter's finances which the Tamias has either been asked to provide and deems necessary to provide.

## **AUDIT PRODCEDURES**

When the report of the Tamias (the Financial Report) is presented to the Chapter, it is in all cases referred to the Budget Committee for auditing, as the Chapter cannot endorse of the accuracy of the figures contained within. The Chapter therefore has made provision for this information to be audited by the Budget Committee. Upon completion of the Budget Committee's audit, their report will be presented to the Chapter for adoption. Once the Budget Committee's audit report is adopted, the Tamias is effectively relieved from responsibility in the case of loss vouchers, except in the case of fraud. An unqualified audit report (a report in which there were no findings of material errors, omissions, or violations) effectively endorses the Financial Reports for all periods covered under the audit. A qualified report (one in which there were findings of material errors, omissions, or violations) endorses the Financial Reports for all periods covered under the audit as amended by the Budget Committee's audit report.

Adequate Segregation of Duties dictates that one who has custody of money (Tamias) should not have control of the bookkeeping function (duty of the Tamias-Grammateus). At all times it is appropriate to institute other controls such as requiring a co-signature for checks and a verification count of cash by a second person prior to deposit (this procedure should be accomplished between the Tamias and the Tamias-Grammateus at the time of funds exchange).

## **AUDIT PROCEDURES**

### **Individual Performing Procedure**

Objective: Ensure the balance recorded in the Chapter's records is complete and accurate as determined by comparison with the amounts reported by the Chapter's banking institution.

Procedures – Bank Reconciliation 1. In preparing the bank reconciliation, perform the following

procedures:

- a. Place all cancelled checks received in numerical order.
- b. Place cash balance per the bank statement as of the end of the month on the reconciliation form.
- c. Place cash balance per the general ledger as of the end of the month on the reconciliation form.
- d. Deduct from the bank balance:
  - Deposits and other credits added on the bank statement but not recorded in the general ledger (e.g., direct payments received by the bank).
  - Credits recorded in the general ledger but not shown on the bank statement (e.g., outstanding checks). Review checks outstanding for over six months for disposition.
- e. Compare cancelled checks with the disbursements journal

as to check number, date, payee and amount. Account for the sequence of check numbers. Examine cancelled checks for authorized signature, irregular endorsements or other alterations or unusual items.

- f. Review any voided checks for proper cancellation to prevent

#### **re-issuance of the check. g. Add to the bank balance:**

- Checks and other debits deducted on the bank statement but not recorded in the general ledger (e.g., bank charges, deposits charged back by the bank for insufficient funds – “ISF”, etc.)
  - Debits recorded in the general ledger but not shown on the Bank statement (e.g., deposits in transit).
- h. Investigate all reconciling items promptly (e.g., recording errors, ISF checks, omissions, etc.). i. Submit bank reconciliation to the Basileus or

## *Zeta Phi Beta Sorority, Inc.*

other responsible individual for review and approval.

j. Prepare proposed journal entry to adjust general ledger cash

Accounts for any reconciling items requiring adjustment.

Have the Basileus or other responsible individual initial the journal entry for approval.

# *Zeta Phi Beta Sorority, Inc.*

## **AUDIT PROCEDURES**

### **Individual Performing Procedure**

Objective: Ensure procedures required for the receipt and disbursement of Chapter funds have been followed in accordance with adopted protocols.

Procedures – Vouching of Transactions (RESERVED)

# *Zeta Phi Beta Sorority, Inc.*

## **AUDIT PRODCEDURES**

### **Individual Performing Procedure**

Objective: Ensure the Chapter's budget is accurate and up-to-date with regard to expenditures made and the Chapter's remaining obligations.

Procedures – Review of Budget (RESERVED)

# *Zeta Phi Beta Sorority, Inc.*

## **RECORD RETENTION**

### **Individual Performing Procedure**

Objective: To ensure that accounting records are maintained in a secure location for an appropriate period of time in order to comply with the requirements of government agencies, donors and other outside parties. 1. Maintain the following records in a secure location (fire proof safe or copies off-site) for the indicated time periods:

Permanent Corporate charter and certificate of incorporation  
Minutes of Board of Directors Annual reports Federal form 990 filings with the IRS State and local returns General ledgers and general journals Annual financial statements Property, plant and equipment records Employee pension and insurance records Payroll journals

10 Years Cash receipts book Contracts Grant agreements Restricted net assets documentation

7 Years Cash disbursements book Bank statements and canceled checks Monthly or quarterly financial statements Equipment disposals documents Leases (after termination) Withholding tax statements (form 1099's and W-2's)

5 Years Payroll tax returns General correspondence

4 Years Accounts payable source documents Soror travel and expense reports

Adapted from the "Financial Procedures Manual of Zeta Phi Beta Sorority, Inc. Sigma Nu Zeta, June 29, 2002"

# *Zeta Phi Beta Sorority, Inc.*

## **Other: Paypal Account**

1. the Tamias Grammateus takes on primary responsibility for monitoring and maintaining the paypal account established for Sigma Kappa Zeta Chapter

*Zeta Phi Beta Sorority, Inc.*

Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter (Brooklyn, NY)

**FUND REQUEST FORM**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Event: \_\_\_\_\_

Committee: \_\_\_\_\_

Budget Line: \_\_\_\_\_

Amount of Refund: \_\_\_\_\_

Form of Payment:

Cash \_\_\_\_\_

Chapter Check \_\_\_\_\_

Certified Check/Money Order \_\_\_\_\_

Make Check Payable To: \_\_\_\_\_

Signature: \_\_\_\_\_ Applicant

Signature: \_\_\_\_\_ Tamias

Signature: \_\_\_\_\_ Basileus

**PLEASE ATTACH RECEIPTS WITH PURCHASE HIGHLIGHTED.**

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# Phylacter Modus Operandi

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## **PHYLACTER/PARLIAMENTARIAN PROTOCOL**

1. All potential Sigma Kappa Zeta Constitutional changes will be submitted using a constitutional amendment form and handed to the Parliamentarian at an official chapter meeting.
2. All potential constitutional amendments will be reviewed by the Parliamentarian and presented to the committee for review.
3. All members of the chapter will receive a copy of the proposed constitutional amendments at the next month's chapter meeting for their review. (Note: there will be no voting on these amendments at that meeting)
4. At the following months chapter meeting all financial members will vote as to whether the amendments will be accepted.
5. If amendments are voted in the affirmative then the Phylacter is to instruct the members to complete the section of the "SKZ Constitution addition form" in their current constitution.

# *Zeta Phi Beta Sorority, Inc.*

## **Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter (Brooklyn, NY) Constitution & By-Laws Amendment Form**

“The great purpose of all rules and forms is to serve the will of the assembly rather than to restrain it; to facilitate, and not to obstruct, the expression of their deliberate sense.”

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An amendment may be made in any of the following forms:

a) “Add” or “insert” certain words or paragraphs.

**For example:**

Current wording: The name of the organization shall be Zeta Phi Beta Sorority, Inc.

Suggested amendment: Insert “Sigma Kappa Zeta Chapter; the best chapter in the world” at the end of the above sentence. Or, insert Article 2, Section 1, Paragraph 3.

b) “Strike out” certain words or paragraphs.

**For example:**

Current wording: The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; the best chapter in the world.

Suggested amendment: Strike out “the best chapter in the world” and insert “Brooklyn, NY.”

c) **“Strike out certain words and insert others.”**

**For example:**

Current wording: The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; the best chapter in the world.

Suggested amendment: Strike out “the best chapter in the world” and insert “Brooklyn, NY.”

d) **“Revise wording.”**

**For example:**

Current wording: The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; Brooklyn, NY.

Suggested amendment: Revise to read, “The name of the organization shall be the Sigma Kappa Zeta Chapter (Brooklyn, NY) of Zeta Phi Beta Sorority, Inc.

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*Zeta Phi Beta Sorority, Inc.*

Date Submitted: \_\_\_\_\_

Financial Soror who submitted the form: \_\_\_\_\_

Amendment Type:

(Check one) Addition Deletion Revision

Article: Section: \_\_\_\_\_ Paragraph: \_\_\_\_\_

Current Wording:

Suggested Amendment:

Rationale for Amendment:

(Check one) Addition Deletion Revision

Article: \_\_\_\_\_ Section: \_\_\_\_\_ Paragraph: \_\_\_\_\_

Current Wording:

Suggested Amendment:

Rationale for Amendment:

**: FOR PARLIAMENTARIAN USE ONLY**

Is the suggested amendment in accordance with Roberts Rules of Order? Yes No

Is the suggested amendment in accordance with ZΦB National, Regional and State Constitutions? Yes No

Is the suggested amendment in the best interest of the chapter? Yes No

**All responses must be in the affirmative to recommend this amendment.**

\_\_\_\_\_ I have thoroughly reviewed the suggested amendment (s) and found that the suggestions are within the guidelines of Roberts Rules of Order and our National, Regional and State Constitutions. I have also found that the suggestions are in the best interest of ZΦB, ΣKZ Chapter. As such, I hereby recommend that this amendment be presented for a vote.

\_\_\_\_\_ I have thoroughly reviewed the suggested amendment (s) and found that the suggestions are NOT within the guidelines of Roberts Rules of Order and our National, Regional and State Constitutions. I have also found that the suggestions are NOT in the best interest of ZΦB, ΣKZ Chapter. As such, I hereby DO NOT recommend that this amendment be presented for a vote.

Please include references to Roberts Rules of Order and/or rationale which support the disapproval of the suggested amendment(s).

*Zeta Phi Beta Sorority, Inc.*

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Received at the \_\_\_\_\_ Chapter Meeting. (Month, Year)

Copies Provided at the \_\_\_\_\_ Chapter Meeting. (Month, Year)

Ratified at the \_\_\_\_\_ Chapter Meeting. (Month, Year)

Denied at the \_\_\_\_\_ Chapter Meeting.

(Month, Year)

**Parliamentarian Committee Members:**

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\_\_\_\_\_, Phylacter Date: \_\_\_\_\_

(Signature)

# *Zeta Phi Beta Sorority, Inc.*

## **Motion Cheat Sheet**

Your motion should include the following:

Who--- Who does this motion effect, who should be involved?

What--- What do you want the chapter to do?

Where ---- Where will this take place?

Why--- Why should we do it?

How – How will it happen?

Examples:

- *Soror Annunziata (who) moved that the Funds Request Form (what) be emailed a week prior to the Chapter meeting for approval (how) from the Tamias (who) so that funds can be dispersed at any meeting (why & where & when).*
- *Soror Dingle (who) moved that SKZ hold a clothing drive (what & how) and actively solicit donations of slightly used clothing from family, friends, and community to be donated (why) to Open Door Church of God In Christ (where). Donations will be collected through the months of Oct., Nov. and December (when).*
- *Soror Gooden moved that by January, 2008 (when) Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter (who) purchases a house (what) on Court Street (where) to rent to the men of Kappa Alpha Psi Fraternity, Dirty South Chapter (who) in order to get extra money to donate towards our scholarship. (why)*

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# Corresponding Secretary Modus Operandi

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## CORRESPONDING SECRETARY PROTOCOL

- a. Correspondence Secretary to submit her own credit or debit card for payment of the OneBox account ONLY and she be reimbursed the yearly subscription of \$84 at the beginning of her term in the position
- b. Corresponding Secretary is responsible for presenting a written report of emails, voicemails and snail mails obtained.
- c. Corresponding Secretary is responsible for retrieving all emails and voicemails from the Onebox account at least three (3) times a week.
- d. Corresponding Secretary is responsible for sending to all chapter members, incoming emails and voicemails at least three (3) times a week. If times is of the essence or the email/voicemail is of urgency, the Corresponding Secretary must send out the chapter immediately.
- e. Corresponding Secretary is responsible for keeping the Onebox address book updated.
- f. No soror should send and or check email from the Onebox account without first receiving notifying the Corresponding Secretary.
- g. Corresponding Secretary will be allowed to shred any snail mail that was (a) received after the deadline, (b) deadline fell between chapter meetings and thus no action could be taken, and/or (c) holds no relevance to the chapter.
- h. Any mail received from International Headquarters with a deadline that falls between chapter meetings must be immediately disseminated to the proper person(s).

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# Finer Womanhood Modus Operandi

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## **Finer Womanhood Protocol**

1. The Finer Womanhood Committee will coordinate the activities of the Finer Womanhood Week(Month) in conjunction with the appropriate Committee chairs.

Finer Womanhood Month begins the last full week of February and concludes on March 31st.

2. The Finer Womanhood Committee will be responsible to plan the Circle of Sisterhood for the month of February during Finer Womanhood Week.

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# Z-HOPE Modus Operandi

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# *Zeta Phi Beta Sorority, Inc.*

## **Z-HOPE Protocol**

The Z-HOPE Coordinator will be responsible for implementing Z-HOPE activities in accordance with the Z-HOPE manual, Chair committee meetings, submit monthly reports to Grammateus and provide calendar of activities to the Antiproktis.

### Overview of Z-HOPE

Zetas Helping Other People Excel, Z-HOPE, is a national service initiative for Zeta Phi Beta Sorority, Inc. Z-HOPE is an interactive holistic multidimensional outreach program designed to enhance, cultivate and empower participants to develop health promoting lifestyle choices across lifespan. The program is designed to address the whole person via a holistic framework that focuses on the three key elements of life: mind, body, and spirit.

### Z- HOPE Objectives

- To provide culturally appropriate informational activities according to the Z-HOPE program format.
- To foster collaborative partnership between community organizations with shared goals
- To provide a standard reporting format to concentrate efforts and demonstrate the organization's impact
- To promote the opportunities for expansion in Stork's Nest programs
- To facilitate community service and mentorship opportunities for members of the organization

### SKZ Z-HOPE Goals

- Must implement one activity from Z-HOPE for women with at least 20 members. Activity selection may be made from the dimensions mind, body or spirit.
- Establish a committee or subcommittee from the membership for each activity, so the group can focus on making the activity a success.

# *Zeta Phi Beta Sorority, Inc.*

## **Z-HOPE Committee**

1. Committee Chair assigns responsibilities to committee members so everyone is involved with a task.
2. Members identify workshop topics, speakers and proposed dates to present to committee for approval. After committee approval, recommendations are put forth to the general membership for vote. Upon approval from general body the speaker will be secured.
3. Committee members will secure site for proposed activity.
4. Committee members will develop public relation flyers and information on the event. All flyers, email correspondence, and requests for speakers are submitted to the Public Relations Committee for review, approval, and distribution to website, listserves, local papers etc. at least two weeks in advance.
5. Committee members will prepare copies of evaluation form, distribute, and compile the results. Committee Chair will share evaluation results as part of her report in chapter meetings then forward to the State Z-HOPE Coordinator within two weeks after the program. Copy will be kept on file.
6. Committee Co-Chair will follow up with written Thank You note to speakers on chapter letterhead. Certificates of Appreciation can be created and presented to speaker.
7. Committee will meet monthly or as needed to plan, and implement scheduled activities. 8. Committee Chair will develop a Memorandum of Agreement with organizations involved in long term projects. Long term projects are those with ongoing involvement for 6 months or more.

# *Zeta Phi Beta Sorority, Inc.*

## **MEMORANDUM OF AGREEMENT**

From the Sorority's inception, Zeta Phi Beta Sorority, Inc. has long demonstrated an interest in serving the needs of the community. The mission of Zeta Phi Beta Sorority, Inc., Sigma Kappa Zeta Chapter, an organization of community-conscious, college-educated women, is actively committed to strengthening families, children, and communities through educational initiatives, peer mentoring, grass roots volunteerism, coalition building, and economic empowerment in support of girls and women. Z-HOPE: Zetas Helping Other People Excel™, our national service program, was developed to meet the critical societal needs of the time. Z-HOPE is an interactive, holistic and multidimensional outreach service initiative designed to enhance, cultivate and empower participants to develop health promoting lifestyle choices across the lifespan.

Z-HOPE focuses its efforts within five major populations: women, youth, seniors, men and international women and is designed to address the whole person via a holistic framework that focuses on the three key elements of life: mind, body and spirit.

Z-HOPE responds to the "State of Health in Black America" by creating programs and activities that provide the knowledge of and tools to address The Healthy People 2010 ten leading health indicators:

- Physical Activity - Environmental Quality - Substance abuse - Access to Health Care - Injury & Violence - Tobacco Use - Obesity - Responsible Sexual Behavior - Mental Health - Immunization

Sigma Kappa Zeta Chapter will coordinate dates, time and topics of workshops to be conducted on a monthly basis with the: \_\_\_\_\_

As part of a concerted effort to provide \_\_\_\_\_, The (organization) will:

1. Allow residents to participate in workshops coordinated by Zeta Phi Beta

Sorority, Inc. Sigma Kappa Zeta Chapter. 2. Refer residents to educational workshops and publicize event 3. Identify topics of interest to meet program and residents needs

Both parties agree to coordinate dates and times that will facilitate provision of monthly workshops. This Memorandum will remain in full force and effect from September \_\_\_\_\_ through June \_\_\_\_\_ and will be reviewed annually by the signatories or their designees. Both parties agree that this Memorandum can be terminated upon thirty days written notice by either party.

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*Modus Operandi, Third Edition 2020*

# *Zeta Phi Beta Sorority, Inc.*

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President Contact Person Zeta Phi Beta Sorority, Inc. Organization Sigma Kappa Zeta  
Chapter Brooklyn, NY

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*Modus Operandi, Third Edition 2020*

*Zeta Phi Beta Sorority, Inc.*

# Public Relations Modus Operandi

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*Modus Operandi, Third Edition 2020*

# *Zeta Phi Beta Sorority, Inc.*

## **PUBLIC RELATIONS PROTOCOL**

1. Anything submitted to Public Relations for review must be submitted no less than two weeks in advance. I.e. event takes place Dec 1st submission should be no later than Nov. 16th.
2. In the event of an emergency, we must receive one email to [skzprcommittee@gmail.com](mailto:skzprcommittee@gmail.com) and a phone call alerting us of the email and its urgency. Either the Chair or Co-chair will respond within two days.
3. Any external articles/submissions/journal ads will be sent to the chapter, if possible, one week in advance of the due date.
4. In conjunction with the website committee, Public Relations will submit the best photos of each event for use on the website.
5. Regarding flyers, the committee will only take into consideration comments made three days after it is sent to the body for review.
6. All outgoing correspondence is to be sent through the OneBox account.
7. Exactly what are we responsible for (events calendar/website involvement)
8. The committee is responsible for disseminating flyers/announcement to local newspapers/community agencies.
9. The committee is only responsible for sending information regarding chapter activities to the National, State, Regional and local levels.
10. The committee must not use personal email/phone to correspond with outside agencies.
11. The committee will maintain a resource database of media outlets (all types of media).
12. The committee will arrange for the chapter take professional pictures annually
13. All chairs are responsible for creating at least a paragraph overview (highlights) of their completed monthly activities to be included in newsletter.
14. Antipokritis committee be given the discretion to create a “blurb” for an event to be placed in the newsletter if the committee chair does not submit one in a timely manner.

*Zeta Phi Beta Sorority, Inc.*

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*Zeta Phi Beta Sorority, Inc.*

*Storks' Nest  
Protocol*

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# *Zeta Phi Beta Sorority, Inc.*

**Zeta Phi Beta, Sorority, Inc, Sigma Kappa Zeta Storks' Nest Committee.**

**The Stork's Nest Coordinator with the assistance of the Co-chair will be responsible for implementing Stork's Nest activities, Chair committee meetings, develop Committee agenda, select sub-committee chair, submit monthly reports to Grammateus, develop appoint and provide calendar of activities to the SKZ Chapter calendar\_\_\_\_\_.**

## **Overview of the Stork's Nest**

**A cooperative project of Zeta Phi Beta Sorority, Inc. and the March of Dimes Foundation for more than forty years, Stork's Nest aims to increase the number of women receiving early and regular prenatal care in an effort to prevent cases of low birth-weight, premature births and infant deaths. The first Storks' Nest was launched in Atlanta, Georgia in 1971 as one of many educational and service projects of Better Infant Births (BIB), a highly successful program sponsored by the Fulton DeKalb-Clayton Chapter of the March of Dimes. The program was so successful that Zeta Phi Beta Sorority, Inc. adopted Stork's Nest in 1972 as its national project. The first nest to open after it was adopted as Zeta's National Project was in Houston, Texas. Stork's Nest is jointly owned trademark of Zeta Phi Beta Sorority, Inc. and March of Dimes Foundation and can only be implemented by these two organizations.**

## **Stork's Nest Objectives**

**The program is designated to promote prenatal core participation, and encourage healthy behaviors during pregnancy, through**

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# *Zeta Phi Beta Sorority, Inc.*

two-components – incentives and education.

## **Stork's Nest Incentive Program**

Provides incentives for expectant mothers to obtain early and regular prenatal care. Stork's Nest clients “earn points” toward incentives such as,

- o *maternity or baby care items through a variety of positive, health-promoting activities,*
- o *clothing and nursery items for pregnant women who use community health services,*
- *and for,*
- o *attending prenatal visits, participating in prenatal education classes,*
- o *stopping at risk behaviors such as smoking cigarettes and consuming alcoholic beverage, reducing stress, etc.*

## **Stork's Nest Education Program**

Provides educational opportunities for pregnant women to,

- help them make informed choices and decisions relating to parenting, nutrition, and health, and
- provide information and referral to community resources to enhance the physical and emotional well-being of mothers and their families.

Storks' Nest are continuing to expand their services with more than 80 Nests throughout the country.

## **Sigma Kappa Zeta Goals**

From the sorority inception, Zeta Phi Beta Sorority, Inc. has long

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## *Zeta Phi Beta Sorority, Inc.*

demonstrated an interest in serving the needs of the community. The mission of Sigma Kappa Zeta Chapter (“SKZ”), an organization of community-conscious, college-educated women, is actively committed to strengthening families, children and communities through educational activities, peer mentoring, grass root voluntarism, coalition building, and economic development in support of girls and women.

Zeta Phi Zeta, Inc. Sigma Kappa Zeta Chapter, will provide volunteer services in connection with its mission of sisterhood and service to achieve the following goals:

- **Goal # 1: Reach 35 or more women via enrollment in the SKZ-Stork’s Nest at Kings County Hospital (via attendance sheet)**
- **Goal #2: 85% or more of participants of SKZ-Stork’s Nest at Kings County Hospital will demonstrate an increase in knowledge (via post-test)**
- **Goal #3: The Stork’s Nest Committee will convene two community forums to raise awareness on the Women’s Health Issue of Maternal Morality and Morbidity.**

Sigma Kappa Zeta Chapter will coordinate dates, time and topics of workshops, which will be conducted with cohorts in the Fall and the Spring.

### **Stork’s Nest Committee**

- 1. Committee Chair assigns responsibilities to the committee members.**
- 2. Storks’ Nest Committee will have the following sub-committees: (1) Inventory,(2) Management,(3) Evaluationand (4) reserves the right to**

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## *Zeta Phi Beta Sorority, Inc.*

create ad hoc and/or any other sub-committees as deemed necessary to address emerging issues and the efficient functioning of the committee (such as Fundraising, Building/Room Beautification, Community Relations, Personnel, Education and Publicity).

3. The committee will identify workshop topics in concert with the National Stork's Nest guidelines. The committee will also identify speakers and proposed cohort dates to present to the chapter for approval.

a. Upon the committee's approval, recommendations are presented to the general membership for vote.

b. Upon approval from the general membership body, speaker(s), and workshops dates will be secured and confirmed.

c.

4. Workshop sessions consist of: "You and Your Pregnancy", "Prenatal Care", "Eating Healthy", "Stress During Pregnancy", "Things to Avoid", "The Big Day", "Caring" for Your Baby" and "Postpartum Care"

5. Committee members will develop public relation flyers and information about events.

a. All flyers will be submitted to the Public Relations (Antiprokritis) Committee for review, approval and distribution to the chapter websites, social media, Kings County Hospital and other media outlets at least 4 weeks in advance.

6. Committee reserves the right to make discretionary decision regarding logistics.

7. The evaluation subcommittee members will prepare copies of evaluation form, distribute and tally results.

## *Zeta Phi Beta Sorority, Inc.*

a. Committee Chair will share evaluations as part of the Stork's Nest report to the chapter.

8. Committee Co-Chair will follow up with written Thank You note to speaker (s) on Chapter Letterhead, with Certificates of Appreciation as an additional option.

9. Committee will meet monthly or as needed to plan and implement scheduled activities.

10. Committee will develop Memorandum of Agreement with organizations involved in Stork's Nest in a timely manner.

### Memorandum of Agreement:

#### **STORK'S NEST PROGRAM – 3-WAY COOPERATIVE AGREEMENT:**

Cooperative Agreement (the "Agreement") by and between the March of Dimes Inc. d/b/a March of Dimes, Greater NY Market of the March of Dimes, ("March of Dimes, or "MOD") with offices located at 515 Madison Avenue, 20<sup>th</sup> floor, New York, New York 10022, the Sigma Kappa Zeta Chapter of Zeta Phi Zeta, Inc. ("Zeta Chapter"), with offices located at 315 Flatbush Avenue, #516, Brooklyn NY and New York City Health and Hospitals Corporation ("HHC"), located 125 Worth Street, New York new York 10013, acting by and though NYC Health + Hospitals/Kings County, an operating unit ("KCHC"), located at 451 Clarkson Avenue, Brooklyn New York 11203 (HHC + KCHC collectively hereinafter "support").

# *Zeta Phi Beta Sorority, Inc.*

## **Main Components**

ÖDescription of Cooperative Partners, including primary contacts at Kings County Hospital, March of Dimes and SKZ.

ÖDated Term of Partnership

ÖStork's Nest Project Description

ÖProject Timeline

ÖSignatures of the Principle decision making entities of each partnering organization (President, CEO, etc.)

## **Responsibilities**

**Zeta Phi Beta Chapters:**

vParticipate in Stork's Nest committee meetings

vReview all proposal material for the Stork's Nest Project

vApply for grant or reward funding from MOD and/or other resources

vCoordinates all workshops and facilitators for the Stork's Nest.

vPromote Stork's Nest in the Community

vPrimary source for securing donations and purchasing items for the Stork's Nest

vResponsible for inventory control and redemption process with community partner.

vResponsible for tracking of points, participant record keeping, etc.

vResponsible for providing program/health outcome data for annual surveys.

**Community Partners:**

vReview for approval all proposal material for the Stork's Nest Project

vProvide a secure storage area for Project Inventory (lock and keys).

## *Zeta Phi Beta Sorority, Inc.*

**vAssist in promoting the Stork's Nest program to the community**

**vAssist in providing some of the educational facilitators/presenters for the Stork's Nest program.**

**vAssure that all patient or participant information will be kept confidential. This information such as registration forms and other documents obtained from participants will be kept in a secure area**

**vThe information, such as registration forms, will be gathered from program participants in order to allocate point earned. This information will be collected and tracked.**

**vThe community partner will offer home visiting/case management services to families that need to establish maternal child health services (if applicable).**

### **March of Dimes**

**vParticipate in Stork's Nest Planning meetings and scheduled Stork's Nest workshops and seminars**

**vReview for approval all proposal material for the Stork's Nest Project**

**vProvide March of Dimes public health education materials**

**vDevelop press release for launch of the Stork's Nest Projects in collaboration with the Zeta chapter and community partner.**

*Zeta Phi Beta Sorority, Inc.*

# Historian/Website Modus Operandi \*

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# *Zeta Phi Beta Sorority, Inc.*

## Protocol:

- 1) The chapter is expected to turn over all pictures, awards, mentions, and flyers to the Epistoleus at each chapter meeting. By doing so, the chapter scrapbook and website can be updated in a timely fashion. 2) Any requests for revisions to the website must be put in writing to the chair or co-chair. Once the website has been updated the committee will only respond to corrections on content, not appearance. 3) ~~We must have a photo release form from parents before posting pictures of minors. In addition each chapter member must fill out a form as per national guidelines.~~
- 4) Youth Auxiliary Chairs/Co-Chairs will share copies of the photo release and athletic participation waiver forms with the Epistoleus Chair which shall be kept in accordance with the sorority's document retention policy.
- 5) Photo Release and Athletic Participation Waiver forms shall be obtained in accordance with the sorority's risk management policy and procedure manual.
- 6) Epistoleus and PR Committee will be responsible for maintaining all completed photo release and athletic participation waiver forms in accordance with the sorority's document retention policy.

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*Zeta Phi Beta Sorority, Inc.*

# Sunshine Modus Operandi

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# *Zeta Phi Beta Sorority, Inc.*

## **Sunshine Committee Protocols**

1. The Sunshine Committee will retrieve a report from the Membership Chair of all new members' birthdays and anniversaries within three days of the new members' financial status.
2. The Sunshine Committee will be responsible for sending out shout outs, cards and or flowers for celebration/condolences to chapter members as well as other persons deemed necessary by the chapter starting from the time she is installed in her position,
3. Committee suggests that Sorors, who cannot fulfill their commitment to bring refreshments to the chapter meeting, make alternative arrangements for another Soror to bring refreshments and notify the Sunshine Committee of the change.
4. The Sunshine committee will be responsible for establishing the refreshment calendar for the sorority year.
5. All Members of the chapter are required to sign up to bring refreshments for the chapter meeting.
6. Secret Santa gifts will be limited to \$20.00

*Zeta Phi Beta Sorority, Inc.*

SKZ Zeta of the Year  
Modus Operandi

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# *Zeta Phi Beta Sorority, Inc.*

## **Suggested criteria for Sigma Kappa Zeta Chapter: Zeta of the Year**

1. Has been a member of SKZ for at least one calendar year.
2. Exemplifies the mission and vision of SKZ through significant contributions within the chapter (significant meaning implemented a great program or idea, helped SKZ become a household name in community, etc)
3. Meets at least the "Basic" requirements of an active SKZ member (meeting/event attendance, committee requirements, etc)
4. Has gone above and beyond the call of duty in completing tasks.
5. Has demonstrated through her actions the chosen chapter theme more than any other chapter soror.
6. The Chapter has benefited more from that soror's contribution than from any other soror.
7. Has planted seeds and grown longer roots (they have trained others and grown from others' training her).
8. Has exemplified our sorority's ideals of Scholarship, Service, Sisterly Love & Finer Womanhood.
9. Has attended at least 70% of all community service projects.
10. Has attended at least 70 % of all fund raising projects.
11. Has attended at least 70% of the Youth Auxiliary projects.
12. Is on at least 3 committees and has attended at least 85% of the meetings of all three.

## **Suggested Sigma Kappa Zeta Chapter: Zeta of the Year Protocols**

1. The Sigma Kappa Zeta Chapter Zeta of the Year candidate shall be nominated by any financial active Soror.
2. A Soror can not nominate herself to be Zeta of the Year.
3. The term for Zeta of the Year will be one year.
4. No Soror can hold the title of Zeta of the Year for two terms.
5. A Soror can become a Zeta of the Year two years preceding her title.
6. A Soror who is nominated must meet the minimum requirements at the time of nomination. Submission of names will only be considered two months before the end of the SKZ sorority year.
7. At minimum, the Zeta of the Year Review Committee will comprise of the Executive Board and the Soror who nominates the Zeta of the Year candidate. The Zeta of the Year Review committee of subsequent years will also consist of the Zeta of the Year from previous year.
8. The Zeta of the Year Review Committee will be responsible for verifying qualifications and eligibility.

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*Modus Operandi, Third Edition 2020*

## *Zeta Phi Beta Sorority, Inc.*

9. At the last meeting of the Sorority year, the Zeta of the Year Review committee is responsible for informing the body of the Soror who is most qualified to win the title of Zeta of the Year.
10. Facts supported by the rating system must be presented by the committee supporting the Soror who qualifies for the title.
11. If there are no objections by the body of the Zeta of the Year selected, the Basileus will officially announce the Zeta of the Year during the last Sorority meeting of the year.
12. SKZ Zeta of the Year will be highlighted on our SKZ website for the following Sorority year until another Soror is selected.
13. SKZ Zeta of the Year, local Chapter dues will be paid by the chapter for the subsequent year following her title.

*Zeta Phi Beta Sorority, Inc.*

*Chapter Delegate  
Protocol*

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# *Zeta Phi Beta Sorority, Inc.*

## **CHAPTER DELEGATE PROTOCOL**

1. Once the delegate has been elected, she must immediately complete the meeting registration form and a funds request form to cover the cost of the meeting as outlined in the chapter's constitution and by-laws.
2. The chapter is responsible for paying the "early bird" special rate for all meetings in accordance with the SKZ constitution and by-laws. Any additional fees such as late or regular rates will be the responsibility of the delegates.
3. In instances where the registration material is presented to the chapter late, the chapter is responsible for paying the required fees in accordance to the constitution and by-laws.
4. The chapter is responsible for paying only the standard sorority rate of the hotel room. All hotel upgrades and amenities will be the responsibility of the delegates.
5. When requesting payment for the hotel, the delegate is responsible for requesting a check in the host hotel's name and sending the check at least two weeks in advance to ensure that the hotel has payment for the hotel room. The delegate must contact the hotel to determine the exact cost of the room including all applicable taxes and submit a funds request form in that amount.
6. Delegates are responsible for using their own personal credit/debit card for all other hotel charges.
7. Delegates must attend all meetings in its entirety (i.e. Executive Board, etc.) and must make all the necessary travel arrangements to ensure that they are present for all sessions.
8. Delegates must bring a copy of the State, Regional and National Constitution to all meetings.
9. In addition to meeting minutes, delegates must provide copies of all materials provided at the Regional, State, and/or National meeting. Copies must be provided to all financial members at the following SKZ meeting.
10. Delegates must determine amongst themselves who will be responsible for submitting minutes and making copies of materials provided.
11. Any Delegate who does not provide copies of minutes or materials provided will be responsible for payment in full of all expenses incurred on both delegates' behalf.

*Zeta Phi Beta Sorority, Inc.*

*Modus Operandi*  
*Protocol*

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*Modus Operandi, Third Edition 2020*

# *Zeta Phi Beta Sorority, Inc.*

## **MODUS OPERANDI PROTOCOL**

1. Revision, Deletions or additions to the Modus Operandi can be submitted by any financial Soror. However the Soror who is proposing the changes must discuss said changes with the respective committee chair that may be directly impacted by said revision, deletion or addition.
2. Any revision, deletions, or additions must be submitted using the same process as outlined in the Parliamentary protocol.
3. The Phylacter will update the Modus Operandi as soon as approval is granted by the chapter. However copies of the final revised edition, with all amended changes, will be submitted to chapter members during the last official chapter meeting of the year.
4. If a Soror has a concern regarding the interpretation of the constitution and By-Laws (outside an official chapter meeting) then said Soror is to present her concern to the Phylacter. The Phylacter will call a committee meeting to discuss the interpretation of the constitution and by-laws and grant a final decision based on the committee's interpretation.
5. Copies of the Modus Operandi can only be provided to Non-SKZ Sorors with the expressed approval from the majority of SKZ members

**Zeta Phi Beta Sorority, Inc.**  
**Sigma Kappa Zeta Chapter (Brooklyn, NY)**  
**Modus Operandi Amendment Form**

“The great purpose of all rules and forms is to serve the will of the assembly rather than to restrain it; to facilitate, and not to obstruct, the expression of their deliberate sense.”

---

An amendment may be made in any of the following forms:

- a) “**Add**” or “**insert**” certain words or paragraphs.

**For example:**

**Current wording:** The name of the organization shall be Zeta Phi Beta Sorority, Inc.

**Suggested amendment:** Insert “Sigma Kappa Zeta Chapter; the best chapter in the world” at the end of the above sentence.

- b) “**Strike out**” certain words or paragraphs.

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*Modus Operandi, Third Edition 2020*

# Zeta Phi Beta Sorority, Inc.

**For example:**

**Current wording:** The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; the best chapter in the world.

**Suggested amendment:** Strike out “the best chapter in the world” and insert “Brooklyn, NY.”

c) **“Strike out certain words and insert others.”**

**For example:**

**Current wording:** The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; the best chapter in the world.

**Suggested amendment:** Strike out “the best chapter in the world” and insert “Brooklyn, NY.”

d) **“Revise wording.”**

**For example:**

**Current wording:** The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; Brooklyn, NY.

**Suggested amendment:** Revise to read, “The name of the organization shall be the Sigma Kappa Zeta Chapter (Brooklyn, NY) of Zeta Phi Beta Sorority, Inc.”

---

**Date Submitted:**

--

**Financial Soror who submitted the form:**

--

**Amendment Type:**

*(Check one)*

**Addition**

**Deletion**

**Revision**

**Article:**

**Section:**

**Paragraph:**

**Current Wording:**

--

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*Modus Operandi, Third Edition 2020*

# *Zeta Phi Beta Sorority, Inc.*

**Suggested Amendment:**

**Rationale for Amendment:**

**Amendment Type:**

*(Check one)*

Addition

Deletion

Revision

**Article:** \_\_\_\_\_

**Section:** \_\_\_\_\_

**Paragraph:** \_\_\_\_\_

**Current Wording:**

**Suggested Amendment:**

**Rationale for Amendment:**

# Zeta Phi Beta Sorority, Inc.

## FOR PARLIAMENTARIAN USE ONLY:

Is the suggested amendment in accordance with Roberts Rules of Order? Yes  No

Is the suggested amendment in accordance with ZΦB National, Regional and State Constitutions? Yes  No

Is the suggested amendment in the best interest of the chapter?  Yes  No

### All responses must be in the affirmative to recommend this amendment.

   I have thoroughly reviewed the suggested amendment (s) and found that the suggestions are within the guidelines of Roberts Rules of Order and our National, Regional and State Constitutions. I have also found that the suggestions are in the best interest of ZΦB, Σ KZ Chapter. As such, I hereby recommend that this amendment be presented for a vote.

       I have thoroughly reviewed the suggested amendment (s) and found that the suggestions are **NOT** within the guidelines of Roberts Rules of Order and our National, Regional and State Constitutions. I have also found that the suggestions are **NOT** in the best interest of ZΦB, Σ KZ Chapter. As such, I hereby **DO NOT** recommend that this amendment be presented for a vote.

Please include references to Roberts Rules of Order and/or rationale which support the disapproval of the suggested amendment(s).

A. Wright- Yes  
B. Tatham-Yes  
M.Henry-Yes  
S.Dukes-Yes  
S.Alceus-Yes

RONR (11th Ed) p.97-98.

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Received at the April, 2020 Chapter Meeting.  
(Month, Year)

Copies Provided at the June 2020 Chapter Meeting.  
(Month, Year)

Ratified at the May 2020 Chapter Meeting.  
(Month, Year)

Denied at the \_\_\_\_\_ Chapter Meeting.

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*Modus Operandi, Third Edition 2020*

# Zeta Phi Beta Sorority, Inc.

(Month, Year)

Parliamentarian Committee Members:

—

\_\_\_\_\_

\_\_\_\_\_, Phylacter      Date: \_\_\_\_\_  
(Signature)

## Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter (Brooklyn, NY)

### Modus Operandi Amendment Form

*“The great purpose of all rules and forms is to serve the will of the assembly rather than to restrain it; to facilitate, and not to obstruct, the expression of their deliberate sense.”*

---

An amendment may be made in any of the following forms:

e) “Add” or “insert” certain words or paragraphs.

**For example:**

Current wording: The name of the organization shall be Zeta Phi Beta Sorority, Inc.

Suggested amendment: Insert “Sigma Kappa Zeta Chapter; the best chapter in the world” at the end of the above sentence.

f) “Strike out” certain words or paragraphs.

**For example:**

Current wording: The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; the best chapter in the world.

Suggested amendment: Strike out “the best chapter in the world” and insert “Brooklyn, NY.”

**g) “Strike out certain words and insert others.”**

**For example:**

Current wording: The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; the best chapter in the world.

Suggested amendment: Strike out “the best chapter in the world” and insert “Brooklyn, NY.”

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*Modus Operandi, Third Edition 2020*

# *Zeta Phi Beta Sorority, Inc.*

## **h) “Revise wording.”**

### **For example:**

Current wording: The name of the organization shall be Zeta Phi Beta Sorority, Inc. Sigma Kappa Zeta Chapter; Brooklyn, NY.

Suggested amendment: Revise to read, “The name of the organization shall be the Sigma Kappa Zeta Chapter (Brooklyn, NY) of Zeta Phi Beta Sorority, Inc.

---

Date Submitted: \_\_\_\_\_

# Zeta Phi Beta Sorority, Inc.

Financial Soror who submitted the form:

\_\_\_\_\_ Amendment Type:

(Check one) Addition Deletion Revision

Page: \_\_\_\_\_ Section: \_\_ Paragraph: \_\_\_\_\_

Will SKZ's Constitution and By-Laws have to change as a result of this amendment? Yes

No

If yes, please submit a constitutional amendment form along with this form.

Current Wording:

Suggested Amendment:

Rationale for Amendment:

(Check one) Addition Deletion Revision

Page: \_\_\_\_\_ Section: \_\_\_\_\_ Paragraph: \_\_\_\_\_

Will SKZ's Constitution and By-Laws have to change as a result of this amendment?

Yes/No

If yes, please submit a constitutional amendment form along with this form.

Current Wording:

Suggested Amendment:

Rationale for Amendment:

**: FOR PARLIAMENTARIAN USE ONLY**

Is the suggested amendment in accordance with Roberts Rules of Order? Yes No

Is the suggested amendment in the best interest of the chapter? Yes No

Did the Soror who submitted the form speak with the respective chair that this revision may impact? Yes No

**All responses must be in the affirmative to recommend this amendment.**

\_\_\_\_\_ I have thoroughly reviewed the suggested amendment (s) and found that the suggestions are within the guidelines of Roberts Rules of Order, are in the best interest of ZΦB, ΣKZ Chapter, and have been discussed with the respective chair that this revision may impact. As such, I hereby recommend that this amendment be presented for a vote.

\_\_\_\_\_ I have thoroughly reviewed the suggested amendment (s) and found that the suggestions are within the guidelines of Roberts Rules of Order, are in the best interest of ZΦB, ΣKZ Chapter, and have been discussed with the respective chair that this

ZΦB ΣKZ

*Modus Operandi, Third Edition 2020*

*Zeta Phi Beta Sorority, Inc.*

revision may impact. As such, I hereby recommend that this amendment be presented for a vote.

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**Will SKZ's Constitution and By-Laws have to change as a result of this amendment? Yes No**

If yes, did the Soror submit a constitution and By-Laws form? Yes No

Received at the \_\_\_\_\_ Chapter Meeting. (Month, Year)

Copies Provided at the \_\_\_\_\_ Chapter Meeting. (Month, Year)

Ratified at the \_\_\_\_\_ Chapter Meeting. (Month, Year)

Denied at the \_\_\_\_\_ Chapter Meeting. (Month, Year)

**Parliamentarian Committee Members:**

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\_\_\_\_\_, Phylacter Date: \_\_\_\_\_

(Signature)