STANDARD OPERATING PROCEDURES

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NEW YORK STATE DIRECTOR

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of the
Standard Operating Procedures
for the
New York State

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Table of Contents

- Introduction 6
- Elected Officer's Duties
  - New York State Grammateus 8
  - New York State Anti Grammateus 9
  - New York State Tamias 10
  - New York State Tamias Grammateus 12
  - New York State Phylacter 13
  - New York State Undergraduate Representative to the State Executive Board 14
  - New York State Representative to the Regional Elections Committee 15
  - New York State Representative to the Regional Nominating Committee 16
- Appointed Officer's Duties and Responsibilities
  - New York State Director 18
  - New York State Amicae Coordinator 20
  - New York State Budget and Finance Coordinator 21
  - New York State Chapter Management & Development Coordinator 23
  - New York State Demographics Coordinator 24
  - New York State Elder Care Coordinator 26
  - New York State Electronic Communications / Social Media Coordinator 28
  - New York State Finer Womanhood Observances Coordinator 31
  - New York State Founders' Day Coordinator 32
  - New York State Geographic Coordinator 33
  - New York State Grants Administration Coordinator 34
  - New York State Historian 36
  - New York State Internal Audit Coordinator 38
  - New York State Legal Council 39
  - New York State Life Membership Coordinator 41
  - New York State March for Babies Coordinator 42
  - New York State March of Dimes Programs' Coordinator 43
  - New York State Marketing & Corporate Sponsorships Coordinator 44
  - New York State Membership Services Coordinator 46
  - New York State Prematurity Awareness Coordinator 47
  - New York State Print & Electronic Media Coordinator 48
  - New York State Protocol & Rituals Coordinator 50
  - New York State Public Relations Coordinator 52
  - New York State Representative to the National Education Foundation 54
  - New York State Scholarship Coordinator 55
  - New York State Social Action Coordinator 56
  - New York State Special Events Coordinator 58
  - New York State Stork's Nest Coordinator 59
  - New York State Undergraduate Relations Coordinator 60
  - New York State Web Mistress 61

- New York State Youth Auxiliaries Coordinator 62
- New York State Z-HOPE Programming Coordinator 64
- New York State Standard Operating Policy & Procedures Coordinator 65

Elected Officer's Transition Procedures

- New York State Transition Information for the Grammateus 67
- New York State Transition Information for the Phylacter 68
- New York State Transition Information for the Tamias Grammateus 69
- New York State Transition Information for the Tamias 70

Appointed Officer's Transition Procedures

- New York State Director Transition Information 72
- New York State Transition Information for the Amicae Coordinator 73
- New York State Transition Information for the Budget and Finance Coordinator 74
- New York State Transition Information for the Demographics Coordinator 75
- New York State Transition Information for the Founders' Day Coordinator 76
- New York State Transition Information for the Geographic Coordinator 77
- New York State Transition Information for the Grants Administration Coordinator78
- New York State Transition Information for the Historian 79
- New York State Transition Information for the Legal Council Chief Coordinator 80
- New York State Transition Information for the Life Membership Coordinator 81
- New York State Transition Information for the Marketing & Corporate Sponsorships Coordinato3 82
- New York State Transition Information for the Scholarship Coordinator 83
- New York State Transition Information for the Youth Auxiliaries Coordinator 84
- New York State Transition Information for the Standard Operating Policy & Procedures Coordinator 85

Financial Management

- Tamias Grammateus Procedures 89
- Budget Coordinator Procedures 92
- Internal Audit Procedures 94

New York State Financial Obligations 96

Records Retention 97

Marketing & Branding Procedures 100

Website / Email / Social Media Policies 104

Charter / Chapter Reactivation Procedures 110

Protocol Procedures 113

Appendix

- SOP Revision Log 119
- SOP Amendment Form 120
- SOP Correction Form 121
- New York State Officer Report 122
- Example of Scholarship Report 128

- Notice of Bounce Check 129
- Notice of Chapter Credit 130
- Notice of Balance Due 131
- Operational Budget Master Line Item List 132
- Tamias Grammateus Excel Spreadsheets 136
- Proposed Constitution and By Laws Amendment Form 152
- Chapter Financial Reporting Form 153
- Request for Budget Increase 155
- Expense Reimbursement Form 156
- Sample Balance Sheet 157
- Fiscal Sponsorship Application 158
- Project Proposal Submission Form 161
- Motion Form 162
- Chapter Checklist Guidelines 163
- Monthly Update to State Director 164
- Chapter Report 165
- New York State Chapter Youth Inventory 180
- End of Year Youth Survey 181
- Youth Group Graduating Seniors / Scholarship Award 182
- Amicae Service Delivery Reporting Form 183

NEW YORK

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Greetings!

It is with great pleasure that I present New York State's first Standard Operating Procedures Manual. In keeping with our national theme "Building on the Principles of Zeta While Blazing New Paths" this Standard Operating Procedures Manual is intended to be used as a reference by chapters, auxiliaries, New York State elected and appointed officers, and any member that has Budgetary/Financial or Operational responsibilities. Its purpose is to provide an efficient, control and accountability system that will help assure appropriate use of sorority funds.

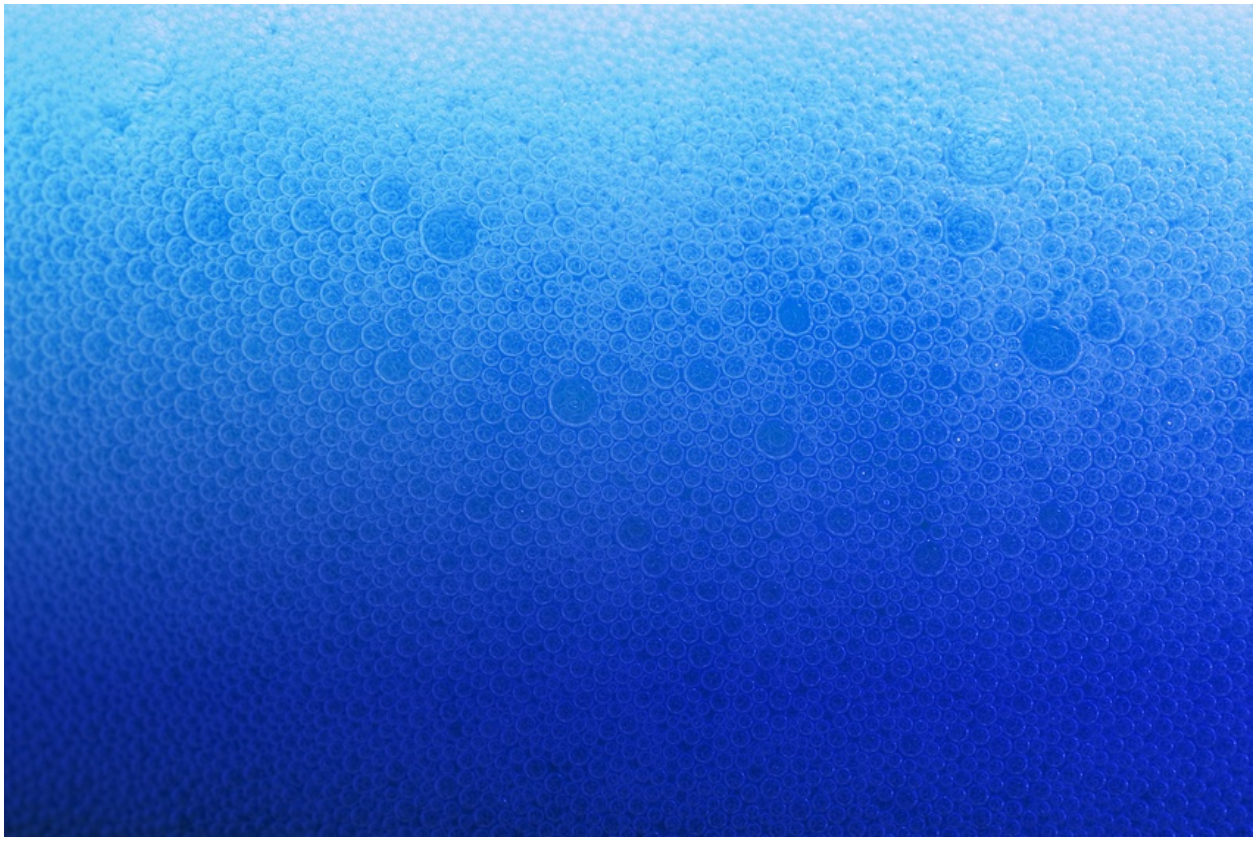
I'd like to thank Soror Valerie Hollingsworth for her tireless efforts and dedication to the completion of this manual. My hope is that each member, chapter and auxiliary of the State of New York will use this as a guide in preparing your own chapter's standard procedures as we continue to operate ZETA in New York State at optimum efficiency through the spirit of cooperation, teamwork and communication.

Yours in Zeta,

Shanell L. Robinson

Shanell L. Robinson

ELECTED OFFICER'S DUTIES AND RESPONSIBILITIES



New York State Grammateus

Preferred Skills

- Excellent oral and written communication, organizational and presentation skills.
- Proficient in Microsoft Word

Major Responsibilities and Duties

- Shall serve as the recorder of the proceedings for New York State
- Shall take minutes at each NYS Executive Board meeting
- Shall take minutes at each NYS leadership conference
- Shall take minutes at each Executive committee meeting
- Shall send copies of the NYS Executive Board meeting minutes to each member of the Board sixty (60) days after the close of the board meeting
- Shall send copies of the NYS leadership conference proceedings to all chapters within ninety (90) days following the close of the State conference
- Shall be responsible for cataloging and filing minutes

New York State Anti Grammateus

Preferred Skills

- Excellent oral and written communication, organizational and presentation skills.
- Proficient in Microsoft Word

Major Responsibilities and Duties

- Shall serve as the backup recorder of the proceedings for New York State in the absence of the Grammateus
- Shall take minutes at any NYS Executive Board meeting in the absence of the Grammateus
- Shall take minutes at any NYS leadership conference in the absence of the Grammateus
- Shall take minutes at any Executive committee meeting in the absence of the Grammateus
- Shall receive and catalog all NYS Correspondence
- Shall read all incoming correspondence at the NYS Executive Board meeting
- Shall read all incoming correspondence at the NYS Leadership Conference
- Shall assist the Grammateus at NYS Executive Board and Leadership Conferences

New York State Tamias

Preferred Skills

- Excellent oral and written communication, organizational and presentation skills.
- Strong management and leadership skills
- Proficient in Microsoft Office Suite (MS Word, Excel and PowerPoint)
- Proficient financial bookkeeping skills

Major Responsibilities and Duties

- Shall be bonded within thirty (30) days after taking office
- Shall be the custodian of all monies received from the Tamias Grammateus of New York State
- Shall disburse monies on vouchers approved and countersigned by the New York State Director
- The Tamias along with the Tamias Grammateus shall approve the vouchers submitted by the New York State Director for reimbursement
- Shall keep an accurate record in the general ledger of all financial transactions of New York State
- Shall be responsible for preparing the 990 forms for the internal revenue department on a yearly basis
- Shall be a member of the New York State Executive Committee and the Budget and Finance Committee
- The records of the Tamias shall be audited on an annual basis by an internal auditor appointed by the New York State Director and the completed report will be disseminated to the graduate and undergraduate members of New York state within sixty (60) days after the report is finalized
- Shall work with the New York State Budget Chair to develop strategies to facilitate the funding of various State programmatic endeavors
- Shall develop and oversee financial accounting and reporting procedures for the organization
- Shall assist in the development of budget/accounting/finance training activities, workshop and instruction materials that are comprehensive in scope; modular-format; understood by lay persons, and ready for use

- Shall prepare and deliver financial report presentations at New York State business meetings/conferences, etc.
- Shall prepare monthly financial status reports for review by the New York State Director
- Shall assist with the development of processes to monitor fiscal audit compliance and ensures adherence to policies and internal controls
- Shall assist the Publication/Communication and Marketing committees in preparing an annual report

New York State Tamias Grammateus

Preferred Skills

- Excellent oral and written communication, organizational and presentation skills.
- Strong management and leadership skills
- Proficient in Microsoft Office Suite (MS Word, Excel and PowerPoint)
- Proficient financial bookkeeping skills

Major Responsibilities and Duties

- Shall be bonded within thirty (30) days after taking office
- Shall be the officer to receive all monies (assessments, etc.) sent by the graduate/undergraduate chapters in New York State
- Shall keep an accurate record in the general ledger of all funds received by this office
- Shall assist the New York State Tamias in preparing the 990 forms for the internal revenue department on a yearly basis
- Shall be a member of the Budget and Finance Committee
- The Tamias Grammateus along with the Tamias shall approve the vouchers submitted by the New York State Director for reimbursement
- Shall work with the New York State Budget Chair to develop strategies to facilitate the funding of various State programmatic endeavors
- Shall assist in developing and overseeing financial accounting and reporting procedures for the organization
- Shall assist in the development of budget/accounting/finance training activities, workshop and instruction materials that are comprehensive in scope; modular-format; understood by lay persons, and ready for use
- Shall prepare and deliver financial report presentations at New York State business meetings/conferences, etc.
- Shall prepare monthly financial status reports for review by the New York State Director
- Shall assist with the development of processes to monitor fiscal audit compliance and ensures adherence to policies and internal controls

New York State Phylacter

Preferred Skills

- Excellent oral and written communication, organizational and presentation skills
- Proficient in the Constitution and By-Laws of New York state
- Proficient in Robert's Rules of Order

Major Responsibilities and Duties

- Shall be present at all meetings of the New York State body
- Shall advise the State Director of the rules and regulations governing said body according to the Constitution and By-Laws of New York State and Robert's Rules of Order (New revised) when called upon by the State Director
- Shall serve as ex-officio for all meetings relative to the Constitution, By-Laws and rules of the Executive board of New York State
- Shall be available for consultant services to the New York State Director and State and local officers in activities pertaining to Constitutional and policy matters
- Shall solicit Constitution and By-Law recommendation changes from the members of the State of New York
- Shall preside over New York State Constitutional forums
- Shall review all New York State chapter constitutions upon the request of the New York State Director to ensure the constitutions are in line with the State, Regional and National Constitution's.

New York State Undergraduate Representative to the State Executive Board

Preferred Skills

- Excellent oral and written communication, organizational and presentation skills.
- Ability to lead small groups, bring out the best in others, and arrive at consensus

Major Responsibilities and Duties

- Shall serve on the New York State Executive Board
- She shall have the responsibility of voicing the concerns of the undergraduate members
- Shall assist in implementing the directives of the State Executive Board
- Shall work with the State Director and the Undergraduate chapters in interpreting the State/Regional and National programs as they relate to Undergraduate chapters

New York State Representative to the Regional Elections Committee

Preferred Skills

- Excellent oral and written communication, organizational and presentation skills.
- Proficient in Microsoft Word

Major Responsibilities and Duties

- Shall serve on the Regional Elections Committee
- Shall assist in creating the Regional Election procedures
- Shall assist in setting up the authorized Regional elections area
- Shall assist in the preparation of the Regional election results report to be presented to the Regional body at its Leadership Conference

New York State Representative to the Regional Nominating Committee

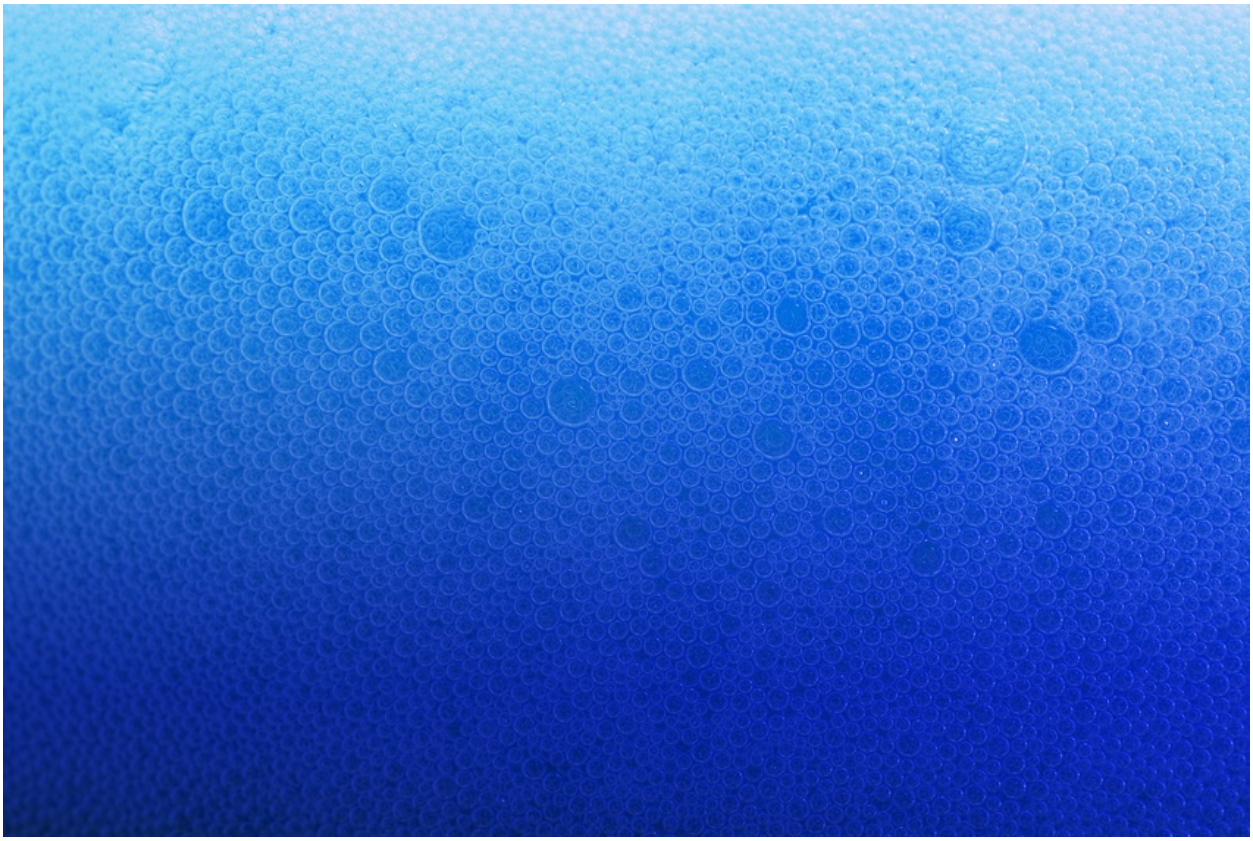
Preferred Skills

- Excellent oral and written communication, organizational and presentation skills.
- Proficient in Microsoft Word

Major Responsibilities and Duties

- Shall serve on the Regional Nominating Committee
- Shall assist in creating the Regional nominating procedures
- Shall assist in the vetting of Regional Candidates
- Shall assist in the preparation of the Regional nominating report to be presented to the Regional body at its Leadership Conference

APPOINTED OFFICER'S DUTIES AND RESPONSIBILITIES



New York State Director

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small/large groups, bring out the best in others, and arrive at consensus
- In-depth knowledge of current National, Regional and State programming
- Program development experience, including visionary with strategic planning ability
- Ability to read and interpret corporate data-driven reports (i.e., surveys, quality measurement, budget and finance) and recognize their importance as they relate to business decision-making

Major Responsibilities and Duties

- The State Director is the Official representative of the State in which she oversees
- She is a member of the State Executive Board
- She reports directly to the Regional Director
- She shall develop goals and objectives for the state based on National goals and programmatic initiatives
- She shall have the power to make appointments for key personnel in order to carry out the business of the state
- She shall also have the power to remove key personnel she has appointed if they are unable to carry out their responsibilities
- She shall disseminate key dates of meetings and state events to the membership of her State
- She shall travel within her state when necessary for various reasons – (IE: Chapter events, State events, investigations, etc.)
- She shall be responsible to disseminate and reinforce all National policy changes to her membership
- She shall be responsible for keeping the Regional Director informed of all activities within her State

- She shall be responsible for keeping the lines of communication open between her State and the Region
- She shall preside over the State Executive Board meetings and the State Leadership Conferences
- She shall prepare a year-end report for dissemination for presentation at the New York State leadership Conference
- She shall be responsible to prepare a state report to be submitted to the Regional Director in order to be presented at the Regional leadership Conference
- She shall be asked by the Regional Director to prepare a brief report of her state activities from September to December of the previous year which will be compiled into an overall report submitted by the Regional Director for presentation at the National Executive Board meeting in January of each year
- She may be called upon to represent the Regional Director in her absence at meetings/events where a representative is requested
- The State Director is required to attend the Regional leadership conferences as well as the Boulé
- She will be assigned duties to carry out at the request of the Regional Director at the Regional Leadership Conferences and Boulé
- She shall be trained on the MIP process by the Regional Director
- She shall be the official MIP trainer for her state
- She shall preside over chapter chartering ceremonies in her State if the Regional Director is not able to be present
- The State Director has the authority to suspend the activities of a chapter while the chapter is under investigation
- She shall be responsible for the final approval of all vouchers submitted to the state by State elected and appointed officers

New York State Amicae Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- In-depth knowledge of current Zeta Amicae Auxiliary programming
- Program development experience, including visionary with strategic planning ability
- Ability to read and interpret corporate data-driven reports (i.e., surveys, quality measurement, budget and finance) and recognize their importance as they relate to business decision-making

Major Responsibilities and Duties

- Serve as the State representative, coordinator, and spokesperson for the State of New York's Zeta Amicae Auxiliary Program.
- Establish business, institutional, and corporate relationships for the purpose of securing sponsorships for grant funding and partnerships to aid in advancing the goals for the State of New York Zeta Amicae Auxiliary Program.
- Coordinate the development of procedures and practices to facilitate the standardization of programming and operations of Amicae across the State of New York.
- Facilitate the development, implementation, and scheduling of Amicae workshops throughout the State of New York.
- Facilitate the development of programming and implementation/scheduling of State Amicae conferences.
- Facilitate the development of on-going comprehensive training programs and materials for Amicae and Zetas on Local levels
- Coordinate the development/implementation of practices and procedures to facilitate a safe/risk-free Amicae program via Risk Management Planning, including comprehensive safety manuals, volunteer training, Zeta-Amicae relationships, and "risk prevention reporting system".
- Develop Strategic Planning to facilitate the development of long-term planning of Amicae programming

New York State Budget and Finance Coordinator

Preferred Skills

- Excellent oral and written communication, organizational and presentation skills.
- Experience in strategic planning and production of financial reporting instruments for existing and prospective customers
- Experience in budgeting, expense accounting, and forecasting.
- General knowledge of trends in funding, financial laws/rules.
- Proficient in Microsoft Office Suite (MS Word, Excel and PowerPoint)

Major Responsibilities and Duties

- Serve as the State budget/finance director for all financial planning/accounting/reporting matters affecting the State of New York.
- Work with the State Tamias and Tamias Grammateus to develop strategies to facilitate the funding of various State programmatic endeavors.
- Interface with budget/finance personnel on various state programmatic endeavors in the development of budget/accounting/finance programs consistent with Strategic Planning for long-term enhancement plans of said endeavors.
- Develop budget estimates/financial plans for the State of New York.
- Develop and oversee financial accounting and reporting procedures for the State of New York.
- Assist in the development of budget/accounting/finance training activities, workshop and instruction materials that are comprehensive in scope; modular-format; understood by lay persons, and ready for use.
- Prepare and deliver financial report presentations at business meetings, workshops/conferences, etc.
- Prepares and monitors budget modifications, monthly variance reports, quarterly spending plans, and revenue estimates.
- Monitors the state's budgets, projects expenditures, identifies trends and potential issues, and develops recommendations for corrective action.
- Assists with the development of processes to monitor fiscal audit compliance and ensures adherence to policies and internal controls.

- Provides support to Chapters throughout the State of New York on budgetary matters.
- Performs other budget analyses as directed.
- Prepares monthly budget status report to be presented to the New York State Director.

New York State Chapter Management & Development Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- Effective presentation skills
- In-depth knowledge of membership development
- Program development experience, including visionary with strategic planning ability

Major Responsibilities and Duties

- Serve as the NYS Director of Chapter Management & Development
- Coordinate the development of procedures and practices to facilitate the standardization of chapter management/ operations of local chapters across the state of New York
- Facilitate the development, implementation, and scheduling of chapter/officer development workshops throughout the state
- Facilitate the development of on-going comprehensive training programs and materials for chapters/officers/ members and coordinators across the state
- Develop and maintain the New York State Standard Operation Procedures Manual
- Develop Strategic Planning to facilitate the development of long-term planning chapter management/officer/membership training

New York State Demographics Coordinator

Special Knowledge/Skills

- Excellent oral/written communication and presentation skills
- Effective interpersonal skills with ability to work across state committee's; ability to participate in small groups, bring out the best in others, and arrive at consensus
- Highly creative, analytical, and tactical; having the ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Organizational skills; ability to follow-thru on a project from inception to completion
- Training and experiences in research methods and quantitative analysis utilizing statistical packages (example: SPSS, SAS or STATA)
- Knowledge and skills in data collection and reporting
- Research project design and total quality management (TQM) experience
- General knowledge of youth, adult and senior trends/issues and the mining of related census data

Major Responsibilities and Duties

- Serve as the Coordinator for the collection, processing, and reporting of applicable data to aid in planning, decision-making, programming/operations, and marketing for the State of New York.
- Interface with the programmatic initiative committees in the development of demographics data collection and statistical analysis reports needed for Strategic Planning in support of long-term enhancement plans for state and regional initiatives
- Assist in the development of procedures and practices to facilitate the standardization of data collection, storage, and retrieval of New York State related data, including maintaining data and report repositories; improve the quality and flow of data across committee divisions as they relate to various auxiliary/zeta membership and programmatic initiative's planning, operation, and growth
- Collect, analyze, and interpret administrative, survey, and other data through statistical programs such as SPSS, Excel, and Access

- Support data-driven programming decision-making through data collection via construction of appropriate survey instruments; data input, analysis, and interpretation; report writing to appeal to the appropriate topic and audience
- Provide research assistance to support projects of the Auxiliaries and Programmatic Initiatives' Committees including: grant writing, marketing, and strategic planning
- Assist in the institution of and participate in Total Quality Management (TQM) programming to improve the quality of all aspects of membership and programmatic initiatives including: youth and adult membership (recruitment and retention), parent involvement, performance rating, programming/service delivery, funding, partnerships, etc.
- Participate in process identification/planning and data collection design of quality metrics for all membership and programmatic processes
- Participate in workshops and make public presentations
- Train/educate and provide technical support for persons without background in TQM, statistical analysis and interpretation

New York State Elder Care Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- Effective presentation skills
- Program development experience, including visionary with strategic planning ability

Responsibilities / Duties

- Create a committee to assist and support New York State Chapters in their implementation of elder care programs.
- Schedule quarterly conference calls with elder care coordinators from each chapter.
- Organize an elder care breakfast in the beginning of the sorority year for the purpose of sharing ideas and programs with all chapter coordinators.
- Form relationships with political and legislative officials who are dedicated to the care and welfare of the aging in New York State.
- Create a list serve for the NY State Elder Care Coordinators.
- Create/maintain a contact list of key people/organizations working on different issues as it relates to Elder Care.
- Create/maintain a listing of inactive sorority members over the age of 60 in order to keep in contact and work with them to bring them back into the fold.
- Orchestrate the planning of the annual Senior Expo.
- Create an annual report and include photos and information from all NYS Elder Care programs which shall be submitted to the NYS Director.
- Develop relationships with local blogs and newspapers for advertisement of programs for the elderly.
- Develop a calendar of elder care events and distribute to all chapters within the state.

- Collaborate with the NYS Z-Hope Coordinator to create a competition for both undergraduate and graduate chapters as it relates to Elder Care programs and reward the top undergraduate and graduate chapters who have implemented the most elder care programs.

New York State Electronic Communications/ Social Media Coordinator

Special Knowledge/Skills

- Superior oral/written communication and presentation skills
- Effective interpersonal skills with ability to work across committee's; ability to participate in small groups, bring out the best in others, and arrive at consensus
- Highly creative, analytical, and tactical; having the ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Organizational skills; ability to follow-thru on a project from inception to completion; perform under tight schedules
- Project and team management skills
- Detailed understanding of non- profit publication media and tools, including static and interactive web-based material and media, press release material, brochures and promotional material; template development; policy and procedural documentation and form design and development
- Sound knowledge of computer technologies and the internet
- Creative development, and production of communication vehicles for the membership
- Ability to secure information from appropriate sources
- Ability to work in a high-performing, quality-driven, team-based environment
- Ability to plan, format, and execute projects and routine duties in an accurate and timely manner
- Knowledge of preparing advertisements with electronic and print media to enhance business/organizational opportunities
- Knowledge of various social media portals and effective usages
- Superior ability to develop materials for presentation to global audiences
- Ability to build positive relations with members, business people, etc.
- Proficiency with Microsoft Office software, including word processing, spreadsheet, presentation and database applications

Major Responsibilities and Duties

- Manage State of New York internal communications and assist others (PR, Publications and Website teams) with respect to such communications to a diverse set of constituents: State Executive Board; Regional and State Directors; State Appointees; Amicae; Youth; Organizational Partners; and the general public.
- Assist in the development of all State communications including the annual report, program services, marketing collateral materials, etc. Responsibilities include developing themes, designs and layouts, and coordination with communications/publications teams.
- Assist in developing and executing the strategic plan for executive communications, including strategies for building strong professional relationships between New York State and its constituent base.
- Support market research activities in order to keep abreast of changing demographics, partnership/business opportunities, direct- and indirect-competitors, and other relevant issues in order to evaluate marketing activities and to monitor emerging issues.
- Support and assist in the development and implementation of marketing strategies to increase program accessibility and branding.
- Support the development of marketing campaigns and collateral materials for organizational events, such as State Conferences, Prematurity Awareness, March of Dimes, etc.
- Support the oversight of design and content development of the New York State Website.
- Monitor public source materials for items of interest to New York State, including social media portals to ensure protection of New York State's brand, and to understand current climate with respect to non-profit/Greek activities.
- Assist in the development of presentations and speeches for the New York State Director including theme, message, and necessary supporting materials.
- In coordination with the Public Relations/Marketing Director, develop written communications for external release.
- Assist with the managing of all media/press inquiries, including the responses to such inquiries.
- Support with the initiation and management of media relations by creating and maintaining working relationships with relevant writers and editors that cover areas of interest directly tied to the mission and vision of the state and its programmatic goals.

- Provide strong, effective and highly visible support to the Communications team in order to capitalize on the full potential of this most critical resource. Ensure that all members are stimulated, motivated and guided to contribute fully to the realization of New York State's mission, vision, goals and objectives. Empower members to identify innovative approaches to enhance organizational performance.
- Manage the development of all New York State supported internal/external communications utilized by the State Director.

New York State Finer Womanhood Observances Coordinator

Preferred Skills

- Proficient oral and written communication, presentation skills
- Strong interpersonal and organizational skills
- In-depth knowledge of Founders Day Observance procedures and planning needs
- Ability to work under pressure and within time constraints
- Proficient in Microsoft Word

Major Responsibilities and Duties

- Serve as the Director of NYS Finer Womanhood Observances
- Serve as a resource person to the NYS chapters in reference to planning their Finer Womanhood events
- As directed by the NYS Director attend chapter Finer Womanhood programs if the director is unable to attend
- Submit final wrap up report to the State Director on all Finer Womanhood activities in NYS at the end of the observance period

New York State Founders Day Coordinator

Preferred Skills

- Proficient oral and written communication, presentation skills
- Strong interpersonal and organizational skills
- In-depth knowledge of Founders Day Observance procedures and planning needs
- Ability to work under pressure and within time constraints
- Proficient in Microsoft Word

Major Responsibilities and Duties

- Serve as the Director of NYS Founders Day Observances
- Solicit committee members from upstate and downstate
- Work with the Founders Day planning committee to develop creative and entertaining Founders Day programs for both downstate and upstate New York
- Submit monthly status reports to the State Director
- Submit final wrap up report to the State Director and the NYS executive board once the programs are completed

New York State Geographic Coordinator

Preferred Skills

- Proficient oral and written communication, presentation skills
- Strong interpersonal and organizational skills
- In-depth knowledge of Founders Day Observance procedures and planning needs
- Ability to work under pressure and within time constraints
- Proficient in Microsoft Word

Major Responsibilities and Duties

- Serve as the representative of the State Director
- Shall oversee a specific area of New York State as deemed by the State Director
- She shall visit all chapters in the specified area at least once within the sorority year
- Shall convene monthly Basilei conference calls within her specified area in order to provide a platform for Basilei to discuss issues within their chapters as well as bringing them up to date with current information and procedures
- Shall represent the State Director in her absence at various chapter functions within her specified area
- Shall keep the State Director informed on all pertinent chapter issues within her area

New York State Grants Administration Coordinator

Special Knowledge/Skills

- Strong oral/written communication and presentation skills
- Effective interpersonal skills with ability to work across various committee's; Ability to participate in small groups, bring out the best in others, and arrive at consensus
- Highly skilled researcher: creative, analytical, and tactical; having the ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Organizational skills; ability to follow-thru on a project from inception to completion
- Knowledge and skills in strategic planning, creative development, and production of communication vehicles (charts, graphs, presentations) for specific grantors
- Strong database knowledge, including: developing survey/data collection instruments, data analysis, and data interpretation
- Strong knowledge of procedures for conducting research to identify viable grantors

Major Responsibilities and Duties

- Serve as the New York State Committee representative for matters regarding securing grants to fund various New York State programming initiatives
- Work across various committee's to develop strategies to enhance the securing of grants for various New York State programming initiatives
- Interface with PR/Marketing/Communication directors in the development of grant writing efforts consistent with the funding of long-term plans (Strategic Planning) to enhance New York State programming
- Communicate with the New York State Director and the Executive Board regarding the status of grant writing activities
- Assist in the development of procedures and practices to facilitate the standardization of funding and grant writing across the state
- Assist in the development of a grant writing program, materials, and training for applicable Zeta membership
- Conduct research to identify programs focus based on need, organization objectives, and potential grant funding

- Identify potential grantors, programming, and funding that appeal to our focus based programming
- Writing grants to support funding of identified New York State programming

New York State Historian

Special Knowledge/Skills

- Superior knowledge of the history of the organization/State
- Superior oral/written communication and presentation skills; personable and articulate
- Effective interpersonal skills; Ability to participate in small groups, bring out the best in others, and arrive at consensus
- Highly creative, analytical, and tactical; having the ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Organizational skills; ability to follow-thru on a project from inception to completion; perform under tight schedules
- Sound knowledge of computer technologies and the internet
- Knowledge and skills in strategic planning and creative development
- The ability to secure information from appropriate sources

Major Responsibilities and Duties

- Serve as the New York State Historian whose task is to prepare a narrative account of the Sorority's activities in the state of New York from the last publishing through her term of office, which, when approved by the State Director and the State Executive Board, will become a part of the State of New York's official sorority history. All accounts are the property of Zeta Phi Beta Sorority, Inc., State of New York.
- Review the history of the State
- Manage the implementation of content management, document management, and other tools for the effective organization and distribution of publication material
- Maintain a library system as a repository for reference articles, research materials, and printed documents
- Develop a system to facilitate the timely identification of printed document needs and receipt of content from coordinators of programs, projects, and special events
- Identify timelines and employ noted project management techniques (i.e., Gantt charts) for the tracking and timely, coordination, communication, and execution of publishing tasks

- Work with public relations, program/project coordinators, and other personnel to determine themes/high points for the publication and gather materials
- Secure graphic materials and facilitate development of illustrations
- Coordinate the acquisition of ancillary personnel with appropriate skills/abilities to meet the needs of the tasks at hand to ensure the history is thorough and complete
- Secure interviews/information, conduct research, and verify facts
- Organize material, plan page layouts, and select printing specifications
- Review final proofs and coordinate approval for print
- Implement and manage New York State Zeta publication review policies and procedures

New York State Internal Audit Coordinator

Special Knowledge/Skills

- In-depth knowledge of accounting procedures, balance sheets,
- In-depth knowledge of internal auditing process from initial assessment to report presentation
- Knowledge of project management processes and ability to utilize these tool
- Ability to identify problems, conceptualize solutions,
- Effective oral/written communication and interpersonal skills

Major Responsibilities and Duties

- The Internal Auditor will serve as an independent entity, reporting to the New York State Director and the New York State Executive Board.
- Assess new York State's Standard Operating Procedures for financial reporting for effectiveness, and clarity; advise New York State Director and the New York State Executive Board if current procedures safeguard assets and comply with laws and regulations regarding not for profit organizations; recommend changes.
- Measure compliance of financial practices with the organizations' standard operating procedures (SOP) for financial reporting.
- Prepare an annual report evaluating the efficiency and reliability of the financial reporting system for New York State using standard internal auditing procedures to be presented to the New York State Director and the Executive board.
- Coordinate the development of procedures and practices to facilitate the standardization of financial reporting on the State and local Levels.

New York State Legal Council

Qualifications

Education/Certification

- Jurist Doctor in law
- Licensed and in good standing with the NYS State Bar

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- In-depth knowledge of current Zeta Governing Documents and current law relating to non-profit organizations
- Knowledge of parliamentary procedure and board roles and responsibilities
- Knowledgeable in the appropriate publication of Robert's Rules of Order
- Knowledge of Zeta organizational structure and administrative hierarchy as they relate to legal considerations and risk management
- Legal Counsel areas of professional knowledge may include nonprofit organizations, volunteerism, fiduciary responsibilities, auxiliaries, contract management, tax issues
- Program development experience, including visionary with strategic planning ability leading to the ability to deduce legal/risk implications
- Ability to read and interpret corporate data-driven reports (i.e., surveys, quality measurement, budget and finance) and recognize their importance as they relate to business decision-making and possible legal ramifications

Major Responsibilities and Duties

- Serve as a member on the New York State Legal Council for Zeta, which will be comprised of five (5) members (including the chairperson position)
- Serve as an advisory body to provide opinions as to the necessary course of action needed in order to identify, address, and remedy situations that have potential legal consequences=

- Attend New York State Executive board meetings to provide legal advice and handle the various legal matters pertaining to the state if necessary
- Interface with State Public Relations and appropriate personnel (directors, marketing, etc.) from Zeta programs, projects, and auxiliaries to consult on potential legal/risk implications in group specific plans, procedures, and guidelines prior to finalizing
- Coordinate the development of proposed procedures and practices to facilitate the standardization of compliance measures to protect and sustain the assets of Zeta
- Prepare presentations and present at workshops at the State and local levels regarding legal/risk management topics
- Develop a comprehensive Risk Management program as well as organization operations & practices to assess their legal validity and probable success
- Develop standardized investigation and grievance processes for all New York State chapters to follow

New York State Life Membership Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to lead small/large groups, bring out the best in others and arrive at consensus
- The ability to organize a management team for the advancement of life member programs

Major Responsibilities and Duties

- Serve as the State representative, coordinator and spokesperson for Life Members
- Identify and maintain the standards of Life membership
- Work with the State Conference planning team on matters concerning life member programming
- Enhancing communication among current/new life members
- Develop introductory letter to be sent to all new incoming life members
- Develop a life/golden life member's newsletter in order to keep members informed on various life member activities/issues across the State
- Develop a State Life members directory
- Coordinate efforts to monitor the State life members directory on a yearly basis

New York State March for Babies Coordinator

Special Knowledge/Skills

- Knowledge of the March of Dimes partnership with our organization
- Effective oral/written communications and interpersonal skills
- Effective presentation skills
- Ability to mobilize and motivate Zeta chapters/auxiliaries statewide to participate in the annual Walk for Healthier babies

Major Responsibilities and Duties

- Serve as the Coordinator for Zeta chapters/auxiliaries statewide participation in the annual March of Dimes Walk America
- Coordinate with the State ZHOPE chair to extrapolate the ZHOPE documentation on the various Zeta teams across the state involved in the annual walk and the amount of money raised
- Work in conjunction with the March of Dimes to compile the listing of pledge donations from our organization statewide
- Create a year-end report to be submitted to the State March of Dimes Chair in order for the information to be included in the overall March of Dimes team report reflecting the funds raised Statewide by the membership

New York State March of Dimes Programs' Coordinator

Special Knowledge/Skills

- Knowledge of the Zeta partnership with the March of Dimes
- Effective oral/written communications and interpersonal skills
- Good organizational skills; able to plan and coordinate effectively
- Knowledge and experiences in project management
- General knowledge of risk management, strategic planning, and total quality management (TQM) purposes and procedures
- Effective presentation skills, including developing presentations and delivery
- Ability to mobilize and motivate Zeta chapters/auxiliaries statewide

Major Responsibilities and Duties

- Serve as the State of New York March of Dimes representative/coordinator for Zeta chapters/auxiliaries statewide participation in various March of Dimes activities.
- Work with a team consisting of the Stork's Nest, Z-HOPE, Premature Awareness, and Walk America. Coordinator's to provide a system for more efficient and effective management of Zeta efforts in support of the March of Dimes partnership.
- Prepare a detailed fiscal year-end report which would include all March of Dimes activities/initiatives nationwide (Walk America, Stork's Nest, and Premature Awareness).
- Provide the fiscal year-end report to the New York State Director/State Executive Board, and summary report to the Membership.
- Collaborate with March of Dimes team members on developing presentations and support workshops on various March of Dimes initiatives; i.e, Stork's Nest.
- Via TQM practices, work with team members to identify metrics critical to the effective performance of all March of Dimes efforts.
- Using data-driven decision-making, facilitate the development of long-term strategic plans; conduct cost-benefit analyses; and make recommendations for future plans for the March of Dimes partnership, including roles and responsibilities.
- Facilitate the implementation of Risk Management Planning and the development of risk assessment practices/procedures for all areas of the March of Dimes partnerships; include liability responsibilities.

New York State Marketing & Corporate Sponsorships Coordinator

Special Knowledge/Skills

- Strong written/verbal communications skills
- Strategic thinker who excels at generating innovative ideas and is able to execute
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Experience managing social media campaigns
- Experience in developing strategies and tactics for integrated marketing communications and/or strategic communications plans
- Ability to meet deadlines under pressure, monitor and evaluate results
- Knowledge of Word, Excel and PowerPoint

Major Responsibilities and Duties

- Develop marketing strategy, goals, objectives and timeframes and determining appropriate information delivery methods and techniques
- Oversee effective internal and external marketing functions by working closely with the New York State Director and other members of the State Executive Board to ensure messaging is projected to organizational standards, throughout all possible resources
- Manage the ongoing development and execution of the Sorority social media strategy and policies
- Collaborate with the Public Relations/Communications/print & electronic Media directors to develop New York State communications and marketing strategy and create strategies to ensure adequate and appropriate messaging for all New York State programs
- Collaborate with the Publications Director in developing the organizations' publications (IE: Newsletters, etc.)
- Identify, develop and execute external communication strategies for New York State key media contacts, corporate partners, community and nonprofit influencers, and government officials
- Assist the Public Relations, Print & Electronic Media and , Communications directors in reviewing and assessing all publications, periodicals, and other broadcast, print and electronic communications and marketing materials

- Work in conjunction with Communications/Marketing and Website directors appointed by the State Director in developing a New York State Visual Communications and Branding Guide and a Print and Web Style Guide
- Shall collaborate with the Public Relations Director to develop guidelines and manage State Public Relations/Marketing and Scrapbook competitions
- Serve as a member of the New York State Director's special staff and member of the New York State Conference Planning and Special Event teams.
- Shall seek out various corporate entities in which New York State could partner with in order to achieve a higher level of successful programs through their in-kind/financial donations

New York State Membership Services Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- Effective presentation skills

Major Responsibilities and Duties

- Serve as the NYS Director of Membership Services
- Shall develop proposal incentive programs to increase and reclaim membership numbers throughout the state
- Shall develop strategic incentives to maintain membership numbers throughout the state
- Shall work with the Demographics Coordinator in membership data collection to create quality metrics for all membership and programmatic processes

New York State Prematurity Awareness Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Knowledge of current March of Dimes Prematurity Awareness Initiative

Major Responsibilities and Duties

- Serve as the New York State coordinator, and spokesperson for Prematurity Awareness
- Coordinate with the New York State Z-HOPE chair to extrapolate the Z-HOPE documentation on Prematurity Awareness chapter initiatives across the State
- Create a year-end report to be submitted to the New York State March of Dimes Chair in order for the information to be included in the overall March of Dimes team report reflecting current Prematurity Awareness updates

New York State Print & Electronic Media Coordinator

Special Knowledge/Skills

- Superior oral/written communication and presentation skills
- Effective interpersonal skills with ability to work across committee's; ability to participate in small groups, bring out the best in others, and arrive at consensus
- Highly creative, analytical, and tactical; having the ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Organizational skills; ability to follow-thru on a project from inception to completion; perform under tight schedules
- Detailed understanding of non- profit publication media and tools, including static and interactive web-based material and media, press release material, brochures and promotional material; template development; policy and procedural documentation and form design and development
- Sound knowledge of computer technologies and the internet
- Creative development, and production of electronic media vehicles for the membership
- Ability to secure information from appropriate sources
- Ability to work in a high-performing, quality-driven, team-based environment
- Ability to plan, format, and execute projects and routine duties in an accurate and timely manner
- Knowledge of preparing advertisements with electronic and print media to enhance business/organizational opportunities
- Knowledge of various social media portals and effective usages
- Superior ability to develop materials for presentation to global audiences
- Ability to build positive relations with members, business people, etc.
- Proficiency with Microsoft Office software, including word processing, spreadsheet, presentation and database applications

Major Responsibilities and Duties:

- Manage New York State Print & Electronic Media and assist others (PR, Publications and Website teams) with respect to such communications to a

diverse set of constituents: State Executive Board; the State Director; State Appointees; Amicae; Youth; Organizational Partners; and the general public

- Assist in the development of all State electronic media & print communications including the annual report, program services, marketing collateral materials, etc. Responsibilities include developing themes, designs and layouts, and coordination with communications/publications teams
- Assist in developing and executing the strategic plan for electronic media communications, including strategies for building strong professional relationships between New York State and its constituent base
- Support market research activities in order to keep abreast of changing demographics, partnership/business opportunities, direct- and indirect-competitors, and other relevant issues in order to evaluate marketing activities and to monitor emerging issues
- Support and assist in the development and implementation of media strategies to increase program accessibility and branding
- Support the development of media campaigns and collateral materials for organizational events, such as State Conferences, Prematurity Awareness, March of Dimes, etc.
- Assist in monitoring public source materials for items of interest to New York State, including social media portals to ensure protection of New York State's brand, and to understand current climate with respect to non-profit/Greek activities
- Assist in the development of presentations and speeches for the New York State Director including theme, message, and necessary supporting materials
- Assist with the managing of all media/press inquiries, including the responses to such inquiries
- Support with the initiation and management of media relations by creating and maintaining working relationships with relevant writers and editors that cover areas of interest directly tied to the mission and vision of the state and its programmatic goals
- Provide strong, effective and highly visible support to the Communications team in order to capitalize on the full potential of this most critical resource. Ensure that all members are stimulated, motivated and guided to contribute fully to the realization of New York State's mission, vision, goals and objectives. Empower members to identify innovative approaches to enhance organizational performance
- Manage the development of all New York State supported media and print communications utilized by the State Director

New York State Protocol & Rituals Coordinator

Preferred Skills

- Excellent verbal and written communication
- Strong interpersonal, organizational and analytical skills
- In-depth knowledge of Protocol procedures and the rules and regulations governing the management of all levels of Zeta Phi Beta Sorority, Inc.
- Strong understanding of the Sorority's' Structure
- Experience working on multiple assignments simultaneously and handling confidential and sensitive issues
- Ability to work under pressure and within time constraints

Major Responsibilities and Duties

- Serve as the State of New York's representative on protocol and rituals ensuring that all policies and procedures are disseminated and adhered to by the State and Chapters within the State.
- Develop/revise the Protocol procedures and distribute to the sisterhood.
- Facilitate the development, implementation, and scheduling of protocol workshops throughout the State of New York.
- Notify the respective chapters on the travel itinerary of the International Grand Basileus, the Atlantic Regional Director or other national officers so that they may be afforded the respect and courtesies due their office.
- Member of the State Conference planning committee.
- Works with the State Special Events Coordinator to ensure that an arrival and departure schedule is developed for all special guests, dignitaries, etc. Assigns a person to greet each of these individuals as they arrive at the Leadership Conference and arrange airport greetings if necessary.
- Works in tandem with the Director of Public Relations/ Marketing & Communications to develop and implement a plan that ensures all dignitaries receive appropriate correspondence, invitations, receive special welcome letter from the New York State Director and other appropriate material such as the Conference Guidebook etc.
- Develops a job description for hostesses and escorts.
- Creates a detailed protocol work schedule in alignment with the conference schedule.

- Conducts appropriate training for volunteers serving as protocol escorts and hostesses. Training to encompass proper etiquette, assertiveness, personal safety, risk management, customer service, etc.
- Provides escorts for Regional Director, State Director, Past State Directors, and all other visiting dignitaries. Creates personal itineraries for each person to ensure timely arrival at their designated location.
- Coordinates seating of dignitaries, guests and program participants – develop with the Special Events Coordinator, seating diagrams, plot entrances and exists for VIP's, and chart the timing for each person's appearance as appropriate.
- Checks room/ suites to ensure that everything is ok and that the appropriate amenities are in the room.
- Develops a list of needs regarding special amenities, for whom, when, and delivery schedule. This includes distribution of gifts, corsages, etc. Delivers corsages, gifts, programs, etc., to designated guests.
- Coordinates and manages the dais line-up and all other VIP line-ups.
- Develop programs for National Observances which are conducted at New York State Leadership Conferences for Necrology and Rededication.
- Assist chapters in developing appropriate rededication programs to be utilized during Finer Womanhood Observance if needed.
- Develop workshops and update materials on the proper way to conduct Necrology and rededication programs.
- Maintain a yearly listing of all members that have passed on to ensure their names are included in the State/Regional Necrology services.

New York State Public Relations Coordinator

Special Knowledge/Skills

- Strong written/verbal communications skills
- Strategic thinker who excels at generating innovative ideas and is able to execute
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Experience managing social media campaigns
- Ability in managing public relations on cross-functional teams developing strategies and tactics for integrated marketing communications and/or strategic communications plans
- Ability to meet deadlines under pressure, monitor and evaluate results
- Knowledge of Word, Excel and PowerPoint

Major Responsibilities and Duties

- Develop communication strategy, goals, objectives and timeframes and determining appropriate information delivery methods and techniques.
- Oversee effective internal and external communications and marketing functions by working closely with the New York State Director and other members of the New York State Executive Board to ensure messaging is projected to organizational standards, throughout all possible resources.
- Manage the ongoing development and execution of New York State social media strategy and policies
- Collaborate with the marketing team to develop New York State's communications and marketing strategy and create strategies to ensure adequate and appropriate messaging for New York State programs.
- Develop and manage complex public information activities, including: writing, editing and developing content and strategic messages for press releases, media relations content, executive bios, partnership relations materials, interview briefing materials, social media, speeches, etc.
- Collaborate with the Print and electronic media coordinator's in developing the organizations' publications (IE: Newsletters, etc.)
- Identify, develop and execute external communication strategies for New York State's key media contacts, corporate partners, community and nonprofit influencers, and government officials.

- When necessary serve as supporting spokesperson for New York State, drafting statements and responding to media inquiries as directed
- Chair the team of communication professionals appointed by the New York State Director to support special programs, events, and conventions.
- Research and analyze reporter coverage areas and nonprofit industry trends to develop innovative story ideas and conduct media outreach
- Conduct surveys, providing facilitation for focus groups, developing and disseminating information for New York State as directed by the New York State Director.
- Assist the Publication, communication and Marketing directors in reviewing and assessing all publications, periodicals, and other broadcast, print and electronic communications and marketing materials being sent out under the banner of New York State
- Assist the Publication/Communication and Marketing committees in preparing the annual report
- Work in conjunction with the Communications/Marketing and Website coordinators appointed by the New York State Director in developing a New York State Visual Communications and Branding Guide and a Print and Web Style Guide.
- Keep the New York State Director and the State Executive Board aware of timely news items and breaking stories that may influence the State/Sorority.
- Collaborate with the marketing team to develop guidelines and manage State Public Relations/Marketing and Scrapbook competitions
- Serve as a member of the New York State Director's special staff and member of the State Leadership Planning and Special Event teams.

New York State Representative to the National Educational Foundation

Preferred Skills

- Proficient oral and written communication, presentation skills
- Strong interpersonal and organizational skills
- Proficient in Microsoft Word

Major Responsibilities and Duties

- Serve as the NYS Rep to the NEF
- Disseminate NEF information received from the Regional Rep to all New York State Chapters
- Develop ideas for state wide fundraising initiatives to benefit the NEF
- Submit periodic reports to the State Director on the status of NEF activities of the State

New York State Scholarship Coordinator

Preferred Skills

- Proficient oral and written communication, presentation skills
- Strong interpersonal and organizational skills

Major Responsibilities and Duties

- Serve as the NYS Scholarship Coordinator
- Solicit committee members from upstate and downstate
- Shall work in conjunction with committee members to promote the raising of funds for the State Scholarship fund
- Ensure yearly scholarship forms/information is disseminated to all chapters in New York State
- Shall work in conjunction with committee members to review all scholarship applications and make the final determinations on the scholarship recipients
- Submit final wrap up report to the State Director and the NYS executive board once recipients are chosen

New York State Social Action Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- Ability to keep abreast of current Social Action issues
- Program development experience, including visionary with strategic planning ability
- Effective presentation skills, including developing presentations and delivery
- Ability to mobilize and motivate Zeta chapters/auxiliaries statewide

Major Responsibilities and Duties:

- Research and identify social action issues within NY State and determine the impact of these issues on the communities we serve.
- Maintain and update knowledge regarding latest legislative activity at the local, state and national levels.
- Develop and maintain legislative network.
- Identify and build relationships with community leaders and elected officials to positively enhance the mission and objectives of Zeta Phi Beta Sorority, Inc. –NY State.
- Stay in communication with the NY State Director as well as the Regional & National Social Action Coordinators in order to provide information as well as to receive pertinent information.
- Stay in close communication with chapter Social Action coordinators in order to communicate National/Regional/State social action initiatives.
- Create a listserve for the NY State Social Action Coordinators.
- Create/maintain a contact list of key people/organizations working on different issues.
- Encourage each chapter to have a list of their local key contacts.
- Help local chapters with their projects by offering suggestions and linking them to the right people if requested
- Network with social action & service agencies as well as advocacy organizations to develop possible cooperative programming to address the needs of NY State.

- Implement a State Social Action Competition – This will enable us to assess the effectiveness of our Social Action programming and events throughout the State. For this completion, the NY State Social Action, Director needs to work very closely with the State Z-HOPE coordinator, since the Z-HOPE evaluation forms will be used for this competition
- Host Quarterly Social Action Conference Calls – Invite guest speakers to address social action hot topics.
- Schedule a NY State Zeta Summit in Albany
- Facilitate an annual Statewide Anti-Hazing event with Phi Beta Sigma - November 6th (National Anti-Hazing Day)
- Submit one new social action initiative proposal to be added to the Z-HOPE programming list on an annual basis in order to address pertinent issues as they arise

New York State Special Events Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- In-depth knowledge of event planning
- Program development experience, including visionary with strategic planning ability

Major Responsibilities and Duties

- Serve as the NYS Director of Special Events
- Responsible for creating RFP's for all State run events
- Send out RFPs to the various venues
- Review the responses and provide your assessment of the best deals with the State Director
- Once the venue decision is made by the State Director ensure that contracts are in line with the agreed proposals and signed by the State Director
- Will act as the point person for all State run events (IE: Executive Board and State Conference meetings, State Basilei retreats, Founders Day observances, etc.
- Will work closely with the State Director on all logistical/programming matters as it relates to State run events
- Facilitate the development and implementation of workshops on event planning for the chapters in NYS
- Coordinate the development/implementation of practices and procedures to facilitate safe/risk-free events via Risk Management Planning

New York State Stork's Nests Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- In-depth knowledge of current Stork's Nest Programming
- Program development experience, including visionary with strategic planning ability
- Ability to create, read and interpret corporate data-driven reports (i.e., surveys, quality measurement, budget and finance) and recognize their importance as they relate to business decision-making

Major Responsibilities and Duties

- Serve as the New York State coordinator and spokesperson for the Stork's Nest Program.
- Establish business, institutional, and corporate relationships for the purpose of securing sponsorships for grant funding and partnerships to aid in advancing the goals of the Stork's Nest Program.
- Facilitate the development and practices to assist in the standardization of programming and operations of each Stork's Nest across the State of New York.
- Facilitate the development, implementation, and scheduling of Stork's Nest Program reporting (funding/incentive items/# of participants) throughout the State of New York.
- Coordinate with the New York State Z-HOPE chair to extrapolate the Z-HOPE documentation on Prematurity Awareness chapter initiatives across the State.
- Create a year-end report to be submitted to the New York State March of Dimes Chair in order for the information to be included in the overall March of Dimes team report reflecting current Stork's Nest and Prematurity Awareness updates.

New York State Undergraduate Relations Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- Effective presentation skills
- Effective knowledge of membership development

Major Responsibilities and Duties

- Serve as the NYS Director of Undergraduate Relations
- Collaborate with the NYS Director of Chapter Management & Development to facilitate and implement the scheduling of undergraduate chapters/officers and members development workshops throughout the state
- Liaison between the undergraduates and the geographic coordinators. She shall serve in a supportive role to aid and assist the geographic coordinates with dealing with undergraduate issues and concerns
- Shall work closely with the NYS Director of Special Events and the NYS Director of Chapter Management & Development on all logistical/programming matters as it relates to Undergraduate retreats

New York State Web Mistress

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve technical issues
- Familiar with a variety of the field's concepts, practices and procedures
- Require a strong attention to detail and work effectively under tight deadlines
- Working knowledge of data modeling and database design concepts
- Working knowledge of web application engineering and debugging

Major Responsibilities and Duties

- Develop, maintain and update organizational web presence (websites, Facebook, Twitter), including production of web content, in a manner that is appealing to targeted audience.
- Maintain a consistent look and feel throughout all web properties
- Develop, maintain, and ensure integrity of discussion posts, such as a weblog or forum.
- Develop and maintain manuals, pamphlets, presentations, and website information on: web etiquette, Corporate guidelines on acceptable web content, web security, etc
- Copy edit and proofread all web content
- Make presentations to educate membership
- Track and report on all site metrics
- Responsible for crafting site promotions, email newsletters, and online outreach campaigns
- Keep current with emerging web technologies through relevant blogs, list serves, and events
- Assure web-based information is archived for future needs and reference
- Work cooperatively with key team members
- Other duties as assigned by the State Director

New York State Youth Auxiliaries Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- In-depth knowledge of current Zeta Youth Auxiliary programming
- Knowledge of social sciences, including significance of cultural diversity; human growth and development, including: intellectual, emotional, psychosocial, and moral
- Program development experience, including visionary with strategic planning ability
- Ability to read and interpret corporate data-driven reports (i.e., surveys, quality measurement, budget and finance) and recognize their importance as they relate to business decision-making

Major Responsibilities and Duties:

- Serve as the New York State representative, coordinator, and spokesperson for the Zeta Youth Auxiliaries' Program
- Establish business, institutional, and corporate relationships for the purpose of securing sponsorships for grant funding and partnerships to aid in advancing the goals of the Zeta Youth Affiliates Program
- Coordinate the development of procedures and practices to facilitate the standardization of programming and operations of each youth component across the state
- Facilitate the development, implementation, and scheduling of youth/advisors/volunteer workshops throughout New York State
- Facilitate the development of programming and implementation/scheduling of State youth summits
- Facilitate the development of on-going comprehensive training programs and materials for Youth advisors on Local levels
- Coordinate the development/implementation of practices and procedures to facilitate a safe/risk-free youth program via Risk Management Planning, including comprehensive advisor safety manuals, advisor training, and "risk prevention reporting system"

- Develop Strategic Planning to facilitate the development of long-term planning of youth programming
- Coordinate the enhancement of the Zeta Youth Auxiliary Program to ***deliver a state-recognized***, comprehensive, modular-format, leadership-focused program with elements to address (among others): cultural influence, self-improvement, academics (reading/language arts, math, and science/technology), community service, and parent involvement. Programming will be based on sound child-development and psychosocial theory.

New York State Z-HOPE Programming Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- In-depth knowledge of current ZHOPE programming
- Program development experience, including visionary with strategic planning ability
- Ability to read and interpret corporate data-driven reports (i.e., surveys, quality measurement, budget and finance) and recognize their importance as they relate to business decision-making

Major Responsibilities and Duties:

- Serve as the State representative, coordinator, and spokesperson for all ZHOPE Initiatives
- Establish business, institutional, and corporate relationships for the purpose of securing sponsorships for grant funding and partnerships to aid in advancing the goals of the ZHOPE Initiatives.
- Coordinate the development of procedures and practices to facilitate the standardization of programming and operations of each ZHOPE component statewide
- Facilitate the development, implementation, and scheduling of ZHOPE workshops throughout the State of New York
- Facilitate the development of programming and implementation/scheduling of Statewide ZHOPE Initiatives
- Facilitate the development of on-going comprehensive training programs and materials for ZHOPE coordinators on Local levels
- Coordinate the development/implementation of practices and procedures to facilitate a safe/risk-free programming via Risk Management Planning, including comprehensive coordination of manuals/training, and "risk prevention reporting system"
- Develop Strategic Planning to facilitate the development of long-term planning of ZHOPE programming for the State of New York

New York State Standard Operating Policy & Procedures Coordinator

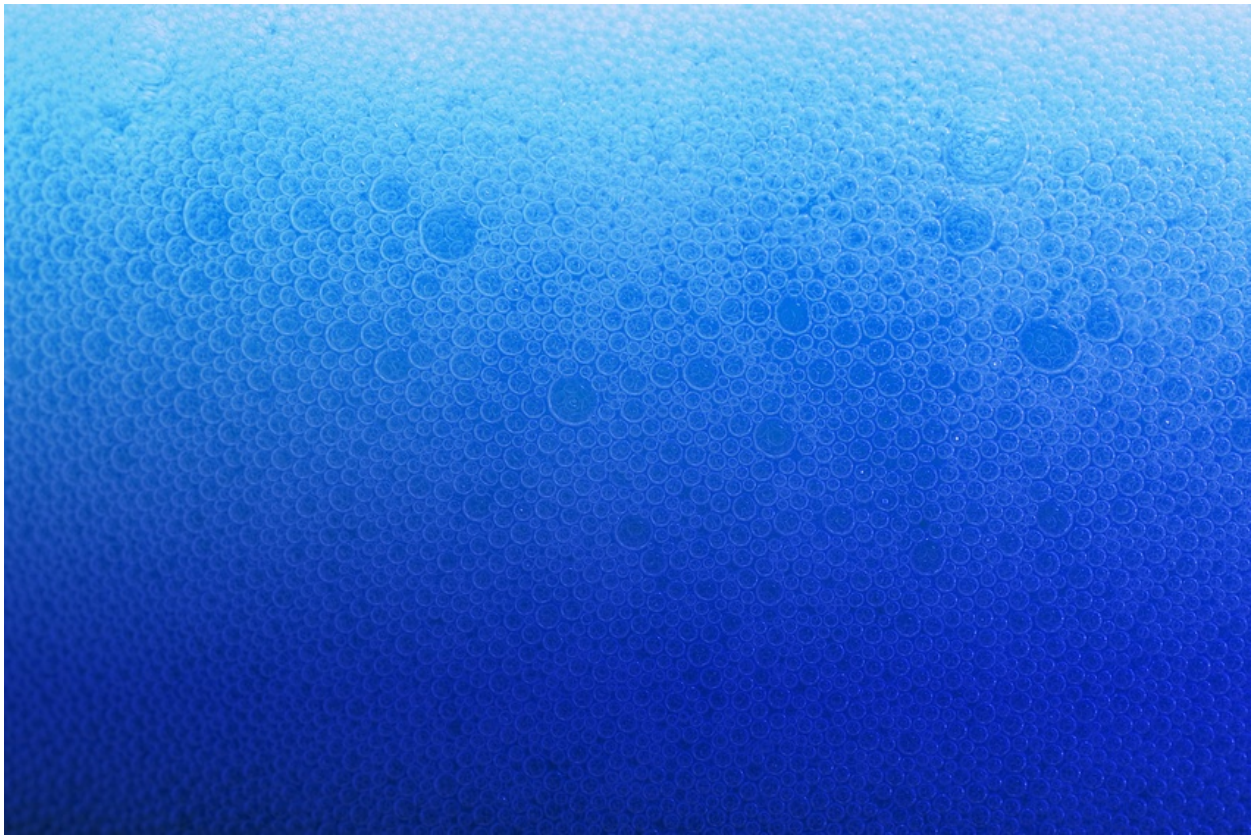
Special Knowledge/Skills

- Effective oral and written communication and interpersonal skills.
- Ability to identify problems, conceptualize solutions, and problem solve via formal process.
- Ability to lead small groups, brings out the best in others, and arrives at consensus.
- Effective presentation skills.
- In-depth knowledge of organizational policies and procedures

Responsibilities/Duties

- Shall maintain the New York State Standard Operating Procedures (SOP) Manual.
- Incorporate changes and ensure SOP is current and updated as needed.
- Shall provide technical assistance to Chapters interested in developing a SOP.
- Shall solicit changes/additions from New York elected and appointed officers.

ELECTED OFFICER'S TRANSITION PROCEDURES



New York State Transition Information for the Grammateus

- Shall turn over a copy of the State SOP manual
- Shall turn over all NYS Executive Board meeting Minutes and corresponding documentation from her entire tenure
- Shall turn over all NYS Leadership Conference Minutes and corresponding documentation from her entire tenure
- Shall turn over all NYS Executive committee meeting minutes and corresponding documentation from her entire tenure

New York State Transition Information for the Phylacter

- Shall turn over a copy of the State SOP manual
- Shall turn over password to the NYSPhylacter@gmail.com account
- Shall turn over copies of all current Graduate and Undergraduate Chapter Constitutions and By-Laws in the State of New York
- Shall turn over copies of all current Amicae Auxiliary Constitutions and By-Laws in the State of New York
- Shall turn over a current copy of the Atlantic Region Constitution and By-Laws
- Shall turn over a current copy of the National Constitution and By-Laws

New York State Transition Information for the Tamias Grammateus

- Shall turn over a copy of the State SOP manual
- Shall turn over the password to the NYSTamiasGrammateus@gmail.com account
- State Chase Bank Account Deposit Card
- Shall turn over financial record binders (which will include copies of vouchers and accompanying documentation, documented communications to chapters and the officers' copy of Chapter assessment forms)
    - Most recent binder should stay with the newly elected Tamias Grammateus
    - Older binders can be prepared for storage
- Shall turn over NYS Chapter Assessment Forms
- Shall turn over NYS Disbursement Vouchers
- Shall turn over the most current listing of chapters in the state with the appropriate mailing addresses
- Shall turn over a copies of all the previous Tamias Grammateus reports
- Shall provide contact information of the outgoing Tamias Grammateus

Action Item

- Change Tamias Grammateus address information on the hard copy triplicate financial reporting forms

New York State Transition Information for the Tamias

- Shall turn over a copy of the State SOP manual
- Shall turn over the password to the nysTamias@gmail.com account
- Shall turn over financial record binders (which will include copies of vouchers and accompanying documentation, documented communications to chapters and the officers' copy of Chapter assessment forms)
    - Most recent binder should stay with the newly elected Tamias
    - Older binders can be prepared for storage

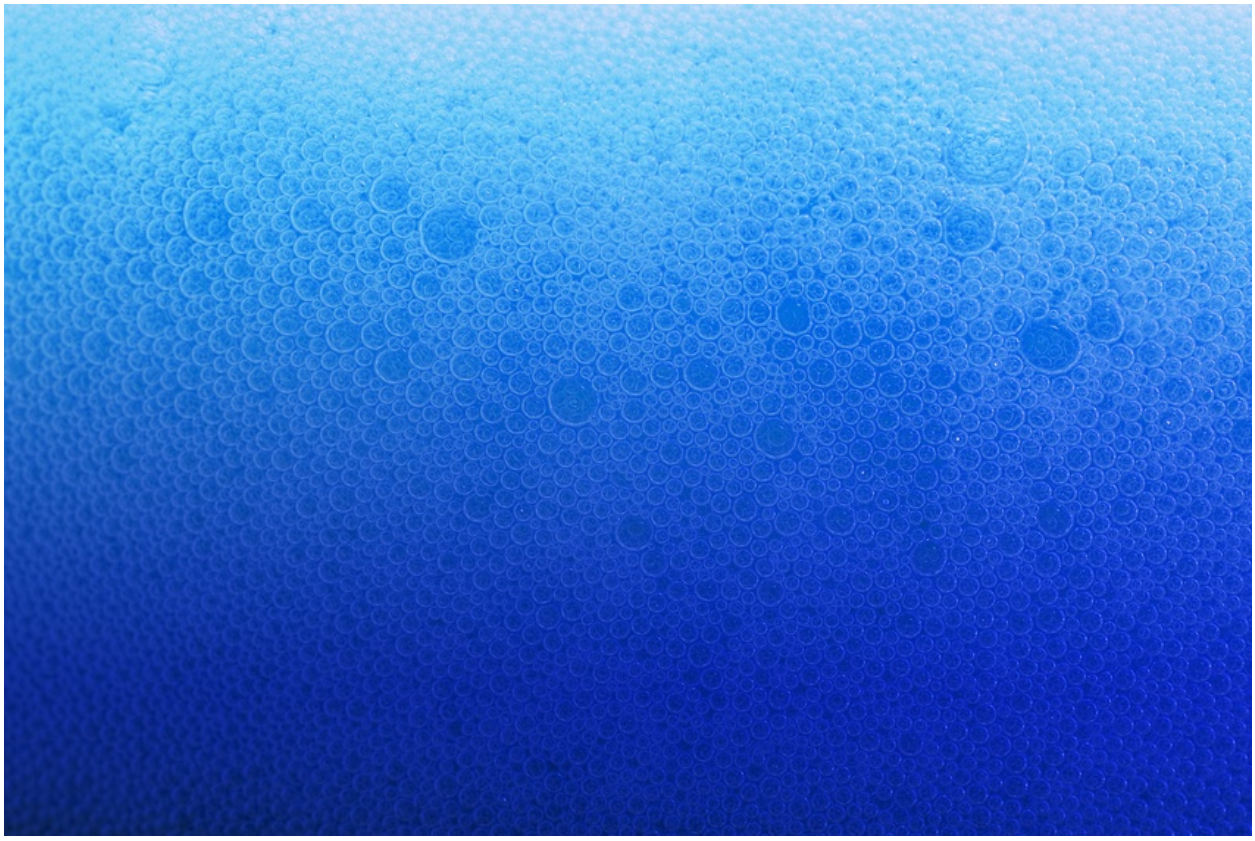
- Shall turn over NYS Disbursement Vouchers
- Shall turn over the most recent updated copy of the NYS budget
- Shall turn over the State check book
- Shall turn over the financial ledger book
- Shall turn over the most current copy of the NYS minutes
- Shall turn over copies of all past Tamias reports
- Shall provide contact information of the outgoing Tamias

Change of Bank Ownership- The immediate past New York State Director and/or Tamias must accompany the newly appointed New York State Director and/or elected Tamias to the bank, in order to have the former officer's name(s) removed from the State's bank account and have the new officer's name(s) added to the State's bank account. Usually 2 forms of governmental issued identification are needed to update State's bank account. In some cases the bank will honor the official announcement from the International Grand Basileus or Regional Director to change the bank ownership to the newly appointed New York State Director without the immediate past New York State Director being present.

Listing of Required supplies

- 3 Ring Binder and Folders
- Book of Stamps
- Note Pad/Loose Leaf Paper
- Security Envelopes

APPOINTED OFFICER'S TRANSITION PROCEDURES



New York State Director Transition Information

- Shall turn over all Duties and Responsibilities documentation for elected and appointed state officers
- Shall turn over final wrap up financial reports for the past 4 State meetings
- Shall turn over copies of hotel contracts for the past 4 State meetings
- Shall turn over final wrap up financial reports for the past 4 State Executive Board meetings
- Shall turn over copies of hotel contracts for the past 4 State Executive Board meetings
- Shall turn over final wrap up financial reports for the past 4 State Basilei Retreats
- Shall turn over copies of hotel/conference venue contracts for the past 4 State Basilei Retreats
- Shall turn over copies of all previous State Director reports
- Shall turn over final membership stats (IE: Grad/Undergrad/Life members/Golden life members)
- Shall turn over final chapter stats (IE: Grad/Undergrad)
- Shall turn over final auxiliary stats (IE: Youth groups/Amicae groups)
- Shall turn over final membership auxiliary stats (IE: Youth/Amicae members)
- Shall turn over listing of chartered chapters within previous 4 years
- Shall turn over copies of all chapter charters
- Shall turn over the final financial report as of June 30
- Shall turn over a copy of the State Standard Operation Procedure Manual
- Shall turn over a copy of the State Protocol Manual
- Shall turn over information on State Storage (IE: contact information, keys, etc.)
- Shall turn over any pending investigation documentation
- Shall turn over copies of documentation on chapters/sorors suspension as per National
- Shall turn over documentation on all active state partnerships
- Shall turn over schedule for recurring bills (IE: Storage, Website domain, etc.)
- Shall turn over historical cataloging reports dealing with the State History

New York State Transition Information for the Amicae Coordinator

- Shall turn over a copy of the State SOP manual
- Shall turn over National Amicae Handbook
- Shall turn over a listing of all active Amicae auxiliaries
- Shall turn over a listing of all inactive Amicae auxiliaries
- Shall turn over information on any pending Amicae charters

New York State Transition Information for the Budget and Finance Coordinator

- Shall turn over a copy of the State SOP Manual
- Shall turn over all fiscal budgets in the officers' possession
- Shall turn over all prior reports (IE: monthly analysis) of previous budgets in the officers' possession

New York State Transition Information for the Demographics Coordinator

- Shall turn over a copy of the SOP manual
- Shall turn over all data collected on the chapters, auxiliaries and membership in her tenure
- Shall turn over all statistical analysis reports
- Shall turn over all procedures created to facilitate the standardization of data collection, storage and retrieval of New York State related data

New York State Transition Information for Founders Day Coordinator

- Shall turn over NYS SOP manual
- Shall turn over the last 4 years wrap up reports on NYS Downstate and Update Founders Day celebrations
- Shall turn over copies of the last 4 years expenses and income for the downstate celebrations
- Shall turn over all information on pending arrangements for the next downstate and upstate celebrations

New York State Transition Information for the Geographic Coordinator

- Shall turn over a copy of the State SOP manual
- Shall turn over the chapter stats for her particular area
- Shall turn over the membership stats for her particular area
- Shall turn over all pending investigation documentation
- Shall turn over the final wrap up report

New York State Transition Information for the Grants Administration Coordinator

- Shall turn over a copy of the State SOP manual
- Shall turn over any documentation for potential grants in the pipeline which are awaiting a response
- Shall turn over all previous grant initiative reports
- Shall turn over all reference material compiled to enable this officer to identify programs focus based on need, organization objectives and potential grant funding
- Shall turn over all documented procedures, practices and training materials developed while in office

New York State Transition Information for the Historian

- Shall turn over all research materials/reference articles and other documentation gathered for New York State History
- Shall turn over the current documented history of New York State
- Shall turn over NYS Zeta publication review policies and procedures
- Shall turn over a copy of the State SOP manual

New York State Transition Information for Legal Council Chief Coordinator

- Shall turn over a copy of the State SOP manual
- Shall turn over all pending grievance issues
- Shall turn over documented procedures and practices created by this team in order to facilitate the standardization of compliance measures to protect and sustain the assets of Zeta
- Shall turn over all documentation on the Risk Management program

New York State Transition Information for the Life Membership Coordinator

- Shall turn over a copy of the State SOP manual
- Shall turn over the most current copy of the Life members' directory
- Shall turn over copies of all introductory letters sent to new incoming life members

New York State Transition Information for the Marketing & Corporate Sponsorships Coordinator

- Shall turn over a copy of the SOP manual
- Shall turn over the established guidelines for overseeing internal and external marketing initiatives
- Shall turn over the documented marketing strategies
- Shall turn over copies of the current marketing materials for New York State
- Shall turn over a listing of all key media/marketing contacts
- Shall turn over a listing of all corporate partners with their contact information
- Shall turn over a potential listing of corporate entities/non profit organizations which the newly appointed officer could follow up on in order to see if the State could make inroads with partnering with them

New York State Transition Information for Scholarship Coordinator

- Shall turn over NYS SOP manual
- Shall turn over all scholarship reports from the past 4 years
- Shall turn over scholarship review procedures

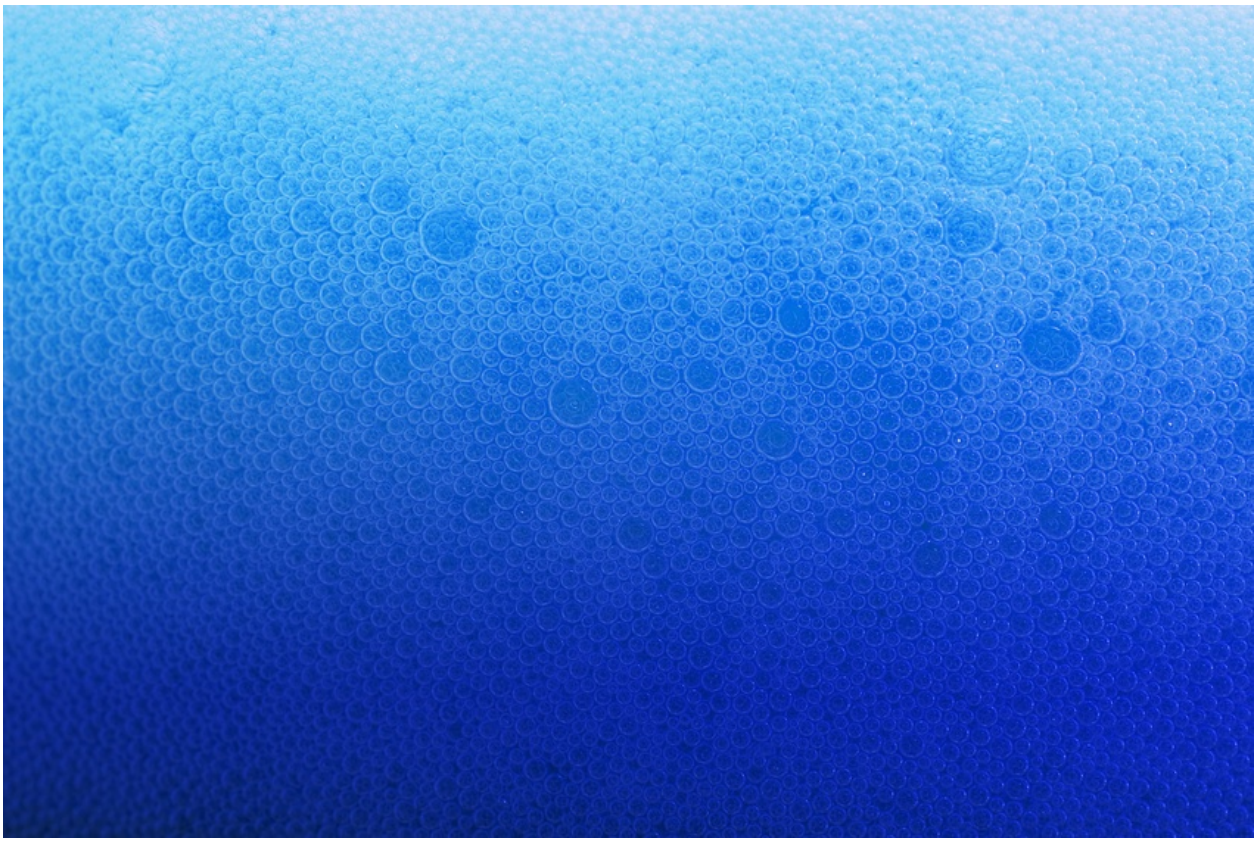
New York State Transition Information for the Youth Auxiliaries Coordinator

- Shall turn over a copy of the State SOP manual
- Shall turn over National Youth Auxiliary Handbook
- Shall turn over a listing of all active Youth auxiliaries
- Shall turn over a listing of all inactive Youth auxiliaries
- Shall turn over information on any pending Youth auxiliaries
- Shall turn over a current listing of all Archonette's who recently graduated from college within the last two years

Transition Information for the Standard Operating Policy & Procedures Coordinator

- Shall turn over a copy of the New York State SOP Manual in Microsoft Word in order for the incoming officer to address changes, deletions or additions to the existing document; and
- Shall turn over the New York State SOP Revision History Log.

FINANCIAL MANAGEMENT



- **Bank Account-** the Tamias shall be one of two officers who are listed on the State's bank account. The other officer is the New York State Director. The Tamias shall maintain adequate internal controls over the States assets and monitor the expenditures to ensure they are in accordance with each line item on the States' budget. Only she and the New York State Director will have access to the account to make purchases, payments, and transfer of funds, issue checks, perform online banking and open/close bank accounts. The Tamias and the Tamias Grammateus shall have access to the state's checking account in order to make deposits into the account. If the Tamias Grammateus directly deposits funds into the State checking account this officer will forward a report to the Tamias which will include copies of the deposited checks and the dates when the checks were deposited.

- **Bank's Check Policy –** (JP Morgan Chase) will honor a check up to 90 days from the date of the check. The Tamias will follow up with the payee after 60 days to remind them of the bank's policy of not honoring a check that is over 90 days outstanding.

- **Stale Dated Checks –** In the event, the stale dated check was not deposited prior to the 90 days deadline it will be up to the discretion of New York State Director to reissue a check to the payable party.

- **Bank Statement** - *S*tatements or any bank correspondence is to be sent to the Tamias mailing address only. Once received, statements are to be reconciled on a monthly basis verses Tamias check and/or journal ledger.

- **Budget Report** – Tamias must maintain a copy of the approved updated budget for the current sorority year to ensure the State's expenditures are in accordance with each budget line item. The Tamias is responsible for advising the responsible party whether or not they are within the spending limit before reimbursement is issued.

- **Chapter Financial Reporting Form** – The Tamias Grammateus is responsible for submitting a report to the Tamias of all chapter assessments received with a copy of each individual Chapter Financial Reporting Form and copies of the checks which were deposited by the Tamias Grammateus.

- **Deposits –** Monies collected must be deposited within 48 hours of receipt into the State's bank account.

- **Financial Reports –** should be updated when a bank transaction has been posted. Please note transactions can be viewed via online banking until physical bank statements are received.

- **Expense Vouchers –** All completed forms shall be submitted directly to the Tamias and must be accompanied with the original receipt of purchase. Tamias will then verify if reimbursement is within approved State's budget, submit voucher to the New York State Director for final approval, maintain all receipts and signed expense vouchers and then disperse check to payable party. **All expense voucher forms must be received within 30 calendar days from date of purchase in order to be reimbursed.** Absolutely no reimbursement will be honored after set deadline.

- **Lost/Stolen Checks-** Payee must notify the Tamias as soon as possible if issued check has been lost or stolen. Tamias will notify financial institution in order to request a stop payment on the issued check.

- **New York State Director-** It is the duty of the New York State Director to notify the Tamias of all debits being incurred and paid for on the State's debit card issued to the NYS Director. The Tamias is responsible for ensuring if the bank transactions are within budget and inform the New York State Director whether or not she is within the budget's spending limits. The New York State Director must also complete an expense voucher, attach the original receipt of purchase and submit them to the Tamias within 30 calendar days. No reimbursements are required for purchases made with the debit card.

- **PayPal Account** – The Tamias and the New York State Director are the only parties that will have access to the PayPal account service, unless the New York State Director advises differently. The service is used to obtain online payments for State events/conferences and said funds are then transferred into State's checking account.

- **Refunds –** there will be no chapter refunds for overpayment of State dues. Chapters will be issued a credit and the credit must be used within the current fiscal year but no later than the following sorority year if not the chapter will forfeit the credit.

- **State's Checks** – All state issued checks must contain the signatures of both the Tamias and New York State Director. Also these two officers are the only officers that can issue checks.

- **Tamias –** the Tamias must also complete an expense voucher in order for her expenses to be reviewed and approved by the New York State Director. The voucher must be accompanied with the original receipt of purchase and shall be submitted to the New York State Director for final approval within the 30 calendar days.

Tamias Grammateus Procedures

Synopsis of Duties/Responsibilities of the TAMIAS GRAMMATEUS

- Receives monies for the State and turn monies over to the Tamias
- Accurately records all monies received
- Properly receipts all sources
- Stays in contact with the Regional Tamias Grammateus to ensure number of financial chapter members match
- Reports to the State Director and to State Conference
- Allows members to review record books if asked

Required supplies

- Binder for record keeping
- At least one book of stamps
- Mailing envelopes
- Receipt book

Information to be disseminated/prepared prior to startup of fall chapter meetings

- Disseminate assessment forms to chapters
    - Mailings should begin **no later than August 15 and completed no later than August 30**
- Prepare a shell of the financial excel spreadsheet

DURING THE SORORITY YEAR

- Receive assessment forms and monies from chapters
    - **ELECTRONIC FORMS:** Chapters are to send the original assessment form and TWO additional copies along with payment to: NYSTamiasGrammateus@gmail.com
        - Original form is placed in record binder
        - One copy is sent to the Tamias along with a copy of the payment
        - One copy is sent back to the Chapter along with receipt
    - **Hard Copy TRIPLICATE FORMS:** Chapters keep the last page and send in the top two pages along with payment to: NYS Tamias Grammateus
        - Top sheet is placed in record binder
        - Second sheet is sent to the Tamias along with a copy of the payment
        - Receipt is mailed to the chapter

- **ASSESSMENT DEADLINES**
  - **Assessments must be received by October 31** of each Sorority year ***– Post marking does NOT count***
  - **Assessments received after October 31** is considered late and chapter will be assessed the pre-determined late fee.

- **Record monies received**
  - Log in the payment onto the excel spreadsheet
  - Prepare communications for the chapter – if necessary
    - Letter of Credit
    - Letter of Payment owed

- **Deposit monies received**
  - Endorse all checks
  - Deposit all monies into the state bank account
  - Deposit can be made at any Chase Bank in person
  - Deposit can be made at and Chase ATM using the State deposit card

- **Receipt sources of payment**
  - Fill out bottom of assessment form
  - Fill out receipt
  - One copy of assessment form, receipt and necessary communication are mailed back to the chapter

- **Communication with Chapters**
  - Overpayment – there will be no refunds, instead a credit will be issued
    - Credit must be used in the current or next sorority fiscal year
    - All credits not used within the correct time frame will be forfeited
    - A letter will be sent to the chapter Basilei, Tamias, and Tamias Grammateus as notification of the credit

  - Underpayment – any chapters not paying all fees in full will be considered unfinancial
    - Notification will be sent to the chapter
    - **Chapters have 30 business days** after notification to clear the debt
    - Notification is to be sent to the Regional Tamias Grammateus with a copy to the Regional Director as well as the state director as to all unfinancial chapters in the state

Reporting

- EXECUTIVE BOARD MEETING
  - **3 weeks prior** to the scheduled E-Board meeting, contact the Regional Tamias Grammateus to ensure member numbers match. ***Remember that chapters must be financial on all levels therefore the number of per capita must match***

  - FOR THE STATE DIRECTOR: Prepare a memo and attach necessary excel spreadsheets for the State Director's review **one week prior the E-Board** meeting
    - Assessments
    - Financial Sorors List
    - At-A-Glance Summary

  - STATE CONFERENCE
    - 3 weeks prior to the state meeting, contact the Regional Tamias Grammateus to ensure member numbers match. *Remember that chapters must be financial on all levels therefore the number of per capita must match*

    - Prepare a **monthly memo** and attach the current excel spreadsheet of Conference payments for the State Director's review

    - Prepare a final memo and attach the finalized excel spreadsheet of the conference income **two weeks prior to the start of the Conference** for the State Director's review

  - Monthly reporting to the STATE DIRECTOR
    - Prepare a memo and attach the necessary excel spreadsheet
    - At-A-Glance Summary (overview of funds received by the Tamias Grammateus from NYS Chapters)

Budget Coordinator Procedures

- All proposals for funding by state officers are to be submitted to the State Director for consideration by March 15th (as per NYS constitution and bylaws)
- Proposals for funding made by the state director are to be submitted to the Finance Committee by March 15th for consideration.
- All reviewed proposals are to be submitted to the Director of Budget and Finance by the State Director on or before April 1st. (as per NYS constitution and bylaws)
- A comprehensive proposed budget prepared by the Director of Budget and Finance is disseminated to elected and appointed officers for review May 1st, but no later than 2 weeks prior to the annual state conference (in instance of early conference schedule).
- Proposed budgets are distributed for review to chapters by May 1st, but no later than 2 weeks prior to the annual state conference (in instance of early conference schedule).
- The approved budget is to be disseminated to NY chapters no later than two business weeks following state conference.
- Late budget requests should be sent directly to the State Director for approval. Approved budget requests will be forwarded to the Director of Budget and Finance to be included for approval at the first scheduled executive board meeting. If accepted, an updated budget is to be disseminated to all officers and chapters no later than two business weeks following the executive board meeting

Budget management

- A reconciled budget report shall be prepared monthly and reported as of the last day of the month. Reconciled budget reports will be based on reports provided by the NYS Tamias and Tamias Grammateus.
- A reconciled budget report shall be disseminated to all state officers no later than two business weeks following the end of the month.
- Line items with a zero or negative balance will be flagged "Insufficient Funds". These line items become ineligible for usage or reimbursements. Notification(s), drafted by the Director of Budget and Finance and signed by the state director will be sent to the officer responsible for the line item, NYS Tamias and NYS Tamias Grammateus. In the event the state director controls the line items, a drafted document will be signed by the state Tamias.
- Requests for additional funding in line items must be in writing to the State Director for approval. The State Director notifies all impacted officers of request and approval status. Approved budget transfers will be reflected in the next budget report and in effect as of the first day of the following month.

- Only the soror identified as the owner of the budget line item can make requests for reimbursements or advances.
- Requests for reimbursement are to be submitted to the State Director no later than 30 days following transaction for approval. Requests by the State Director are to be submitted to the Director of Budget and Finance for approval within 30 days of transactions. Once approved, requests are forwarded to the Tamias for processing.
- All reimbursements are contingent upon availability of funding in approved budget.
- Updated budgets for events and initiatives are to be submitted to the director of budget and finance for reconciliation by the finance committee no later than 30 days following the close of the event.

Internal Audit Procedures

Introduction

Internal financial policies provide **Zeta Phi Beta Sorority, Inc., New York State** with the foundation to properly safeguard its assets, implement internal policies, provide compliance with state and national regulations and produce timely and accurate financial information. Additionally, as a member supported entity, **Zeta Phi Beta Sorority, Inc., New York State** has additional responsibilities to ensure the membership's confidence and the integrity of the activities. The policies of the state may be reviewed periodically to determine if modifications and procedures are necessary.

Compliance with Nationals

Zeta Phi Beta Sorority, Inc., New York State will follow all the relevant laws and regulations that govern the sorority nationally along with its funding sources. Additionally, any national laws and regulations that relate to grant funding will be adopted as the grant funding is received. The following are specific policies of **Zeta Phi Beta Sorority, Inc., New York State**:

The State Director can, but is not obligated to, appoint an auditor to conduct periodic audits of **Zeta Phi Beta Sorority, Inc., New York State**'s financial statements. The State Director can also appoint an audit/finance subcommittee with the help of the appointed internal auditor. The subcommittee will review the scope and provide results of the audit. The audit/finance subcommittee also communicates any notice of any consequential irregularities and chapter comments that was noted during the fiscal year-end audit. Additionally, the internal auditor and subcommittee will develop a corrective action plan to address all relevant weaknesses noted. The audit/finance subcommittee will communicate all financial information of the state and provide recommendations to the state.

The audit/finance subcommittee

The committee should be made up of Zetas within New York State and should have a familiarity with how the organization activities, some understanding of the auditing process, or be willing to learn. Consideration should be given to individuals with experience in business such as bankers, auditors, retired CPAs, financial corporate officers, or those with any background in financial services.

The Internal Auditor must be independent of the State Executive Board or any chapter board it may be auditing. If the Internal Auditor is on the board of a chapter, a member of the subcommittee will audit that chapter and present findings. The internal auditors should adopt a policy that endorses their commitment impartial and unbiased judgment and disclose any activity that could result in a possible conflict of interests.

Appointments of internal auditors should be rotated periodically whenever it is practicable.

The Role of the Internal Auditor

The Internal Auditor evaluates the adequacy of internal controls related to the operating or recording of the finances with regard to:

- The accuracy of the records and the reports to the Executive Board
- The proper authorization of activities and expenditures
- The determination of the physical existence of assets
- A review of the tax-exempt status and identification of any activities that may endanger it
- Ascertaining that taxes, licenses, or corporate reports are properly filed in a timely manner

The Internal audit does not make managerial decisions or mandate State Director, Executive Board or Chapter actions. Internal audit makes recommendations based on their review.

NEW YORK STATE FINANCIAL OBLIGATIONS TO THE ELECTED OFFICERS

New York State Leadership Conference

- NYS elected Officers:
  - Tamias Grammateus
  - Tamias
  - Anti Grammateus
  - Grammateus
  - Phylacter
  - State Rep to the Regional Nominating Committee
  - State Rep to the Regional Elections Committee

- Elected officers will be granted gratis registration or a discounted registration fee contingent upon state availability of funds
- Elected officers will be expected to share a room with another elected officer in order to be eligible for a gratis or discounted room stay. If said officer chooses not to share a room with another elected officer then she will be expected to pay one half of the total room bill

New York State Executive Board Meeting

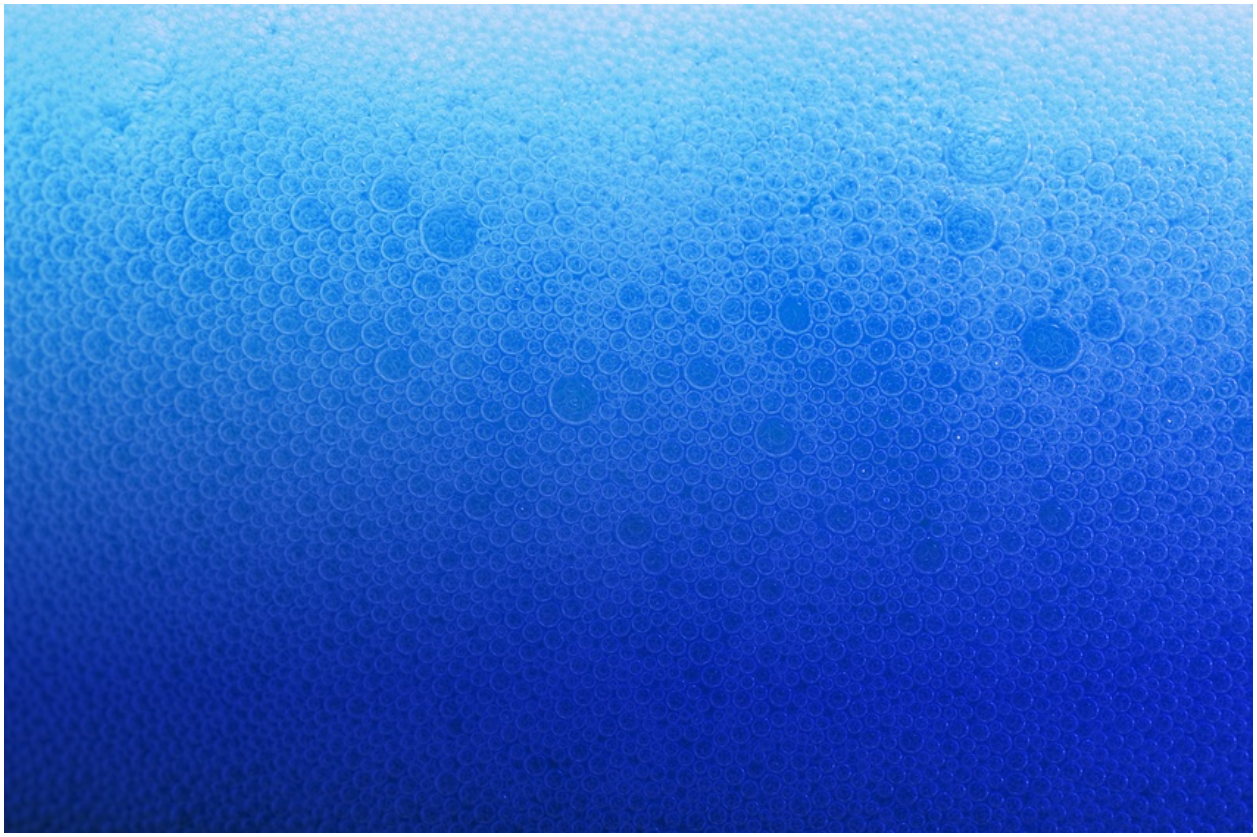
- Elected officers will be granted a gratis or discounted registration fee contingent upon state availability of funds
- Elected officers will be expected to pay for their own lodging if they decide to stay overnight for the one day meeting

Atlantic Regional Leadership Conference

- The New York State Rep to the Regional Nominating Committee will be reimbursed based on the lowest Regional Registration fee (i.e. early registration) and ½ the conference hotel rate. This officer will be expected to pay their registration and hotel bill in advance and submit proof of attendance and a copy of the paid hotel bill to the State Director for reimbursement consideration. All reimbursements will be made 30 days after submission

- The New York State Rep to the Regional Election Committee will be reimbursed based on the lowest Regional Registration fee (i.e. early registration) and ½ the conference hotel rate. This officer will be expected to pay their registration and hotel bill in advance and submit proof of attendance and a copy of the paid hotel bill to the State Director for reimbursement consideration. All reimbursements will be made 30 days after submission

RECORDS RETENTION



A records retention schedule ensures that an organization keeps the records it needs for operational, legal, fiscal or historical reasons, and then destroys them when they're no longer useful.
Retain records longer if litigation, a government investigation or an audit seems likely. In the event that a legal action does transpire, immediately cease all disposal activities. You have to know what you have and how long to keep it—legally and for your own business purposes—before you can establish an efficient records management system. That's why it's important to inventory your records and draw up a chapter retention schedule.

Timetable Tips

- Whether you use these guidelines or conduct your own research to establish a retention schedule, keep the following in mind:
- Don't be a "just in case" hoarder; store records only for legal, operational or archival reasons.
- Retain and destroy documents systematically.
- Segment records according to a retention timetable.
- Don't retain unscheduled temporary materials, such as drafts, reminder notes, work sheets or extra copies.
- Don't hang onto documents just for their sentimental or public relations value. Information must earn its keep, like any other asset. A comprehensive record of the past that fosters a "chapter memory" can be an asset, but be sure to minimize your legal liability while doing so.

RECORD RETENTION SCHEDULE
The retention schedule below reflects standard business practices.
KEY: "P" = Permanent. Otherwise, figures represent suggested number of years for retaining each type of record.

Accounting
Accounts payable ledger: 7
Accounts receivable ledger: 10
Bank deposit records: 6
Bank reconcilement papers: 8
Bank statements: 8
Budget work sheets: 3
Check records: 7
Checks, paid & canceled: 9
Checks, voucher: 6
Donations: 7
Financial statements, periodic: P
Trial balance, accounts receivable: 3
Cash receipts, disbursement records: 10
Check register: 10
Checks, expense: 10
Correspondence, credit & collection: 7
Entertainment, gifts & gratuities: 3
General ledger: P
Petty cash records: 3
Profit & loss statements: P

Administrative
Audit reports, internal: 10
Correspondence, accounting: 5
Correspondence, general: 3
Organized charts: P
Chapter membership: P
Correspondence, tax: 15

Advertising

Activity reports, media schedules: 5
Contracts: 6 yrs. after termination
Correspondence: 5
Drawings & artwork: P
Estimates: 2
Samples, displays, labels, etc.: P

Corporate

Annual reports: P
Charters, constitution, bylaws & amendments: P
Election ballots: 20
Incorporation records & certificates: P
Permits to do business: P

Legal

Affidavits: 10
Charters: P
Claims & litigation of torts & breach of contract: P
Copyrights: P
Trademarks: P

Purchasing

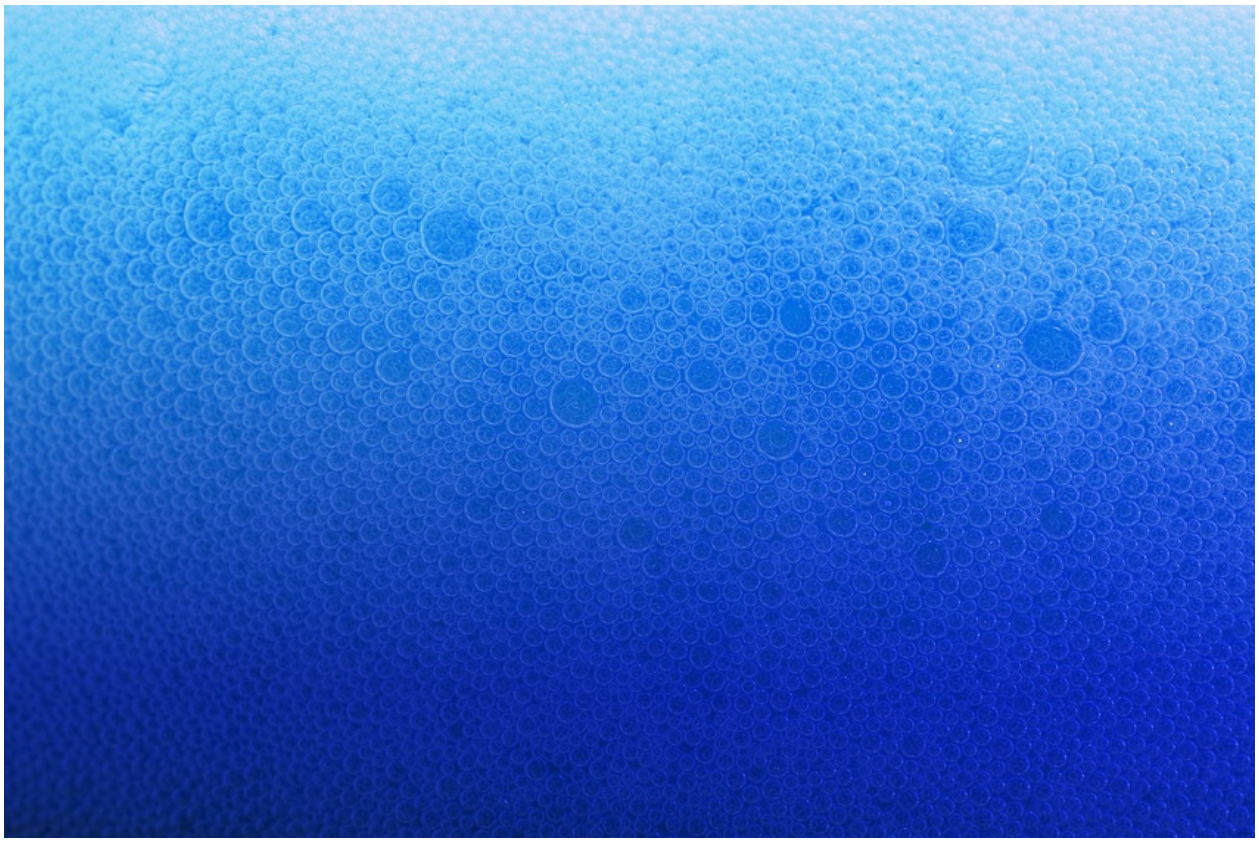
Acknowledgments: 3
Bids, awards: 3
Contracts: 6 yrs. after termination
Correspondence: 5
Orders: 7
Purchase orders: 3
Vendors' contracts: P

Taxation

Exemption status: P
Inventory reports: 16
Tax returns & working papers: P

Source: Records Management handbook, Fellowes Inc., Bankers Box Storage Products.

MARKETING & BRANDING PROCEDURES



Introduction

The policies and procedures listed in this manual is designed to assist New York State chapters of Zeta Phi Beta Sorority, Incorporated achieve print, graphic media, photography, web content, social media and event initiatives that bring consistency and greater visibility to the sorority's marketing and communications efforts.
These policies and procedures provide a roadmap for chapters to use in order to deliver cohesive messages about the good things surrounding Zeta Phi Beta. The Marketing and Public Relations committee sets the goals around which the public image of local area chapters is represented:

- To promote Zeta Phi Beta's national mission, goals and values
- To support the creation of internal and external communication tools
- To expand public awareness
- To develop positive public perceptions
- To drive marketing initiatives

Priorities

Following the policies and procedures will speed up the delivery of excellent services necessary to achieve our vision as a dynamic and creative learning environment focused on student success.

- The Zeta Phi Beta shield must appear on all print and electronic media produced by any chapter for promotional purposes.
- At the end of each email correspondence that is sent on behalf of ZPB, the confidentiality statement should be included at the bottom of the email.
- All active members of a Zeta chapter are encouraged to include their stories and photos for promotional purposes. Promotional material is the sole responsibility of the chapter and all materials must comply with the New York State Zeta Phi Beta style guide.
- If a chapter within New York State decides to have a website, all information on that website must be both accurate and up to date.
- For chapters that choose to explore social media activations, all social platforms that represent a New York State chapter must present content that is unbiased and representative of the sorority's core principles.
- When hosting events with the intention of using photography taken from those events in a promotional fashion, chapters must collect signed approval from attendees before using their images on any materials.
- When providing materials and information to the media, the Director of Marketing and Public Relations must approve all messaging before it is shared.

Social Media Policy

Social media is an effective way to communicate news and information about chapter updates and events with local community members. It is strongly recommended that New York State chapters consider adding a social media component to their promotional strategy.

Recommended platforms include Facebook and Twitter, however, there are many social platforms that chapters may wish to explore and it is up to each chapter to decide which platforms work best for them, if any.

- Social media messaging should be both unbiased and representative of the sorority's core principles.
- No vulgarity or negative portrayals of Zeta Phi Beta Sorority, Inc. and its members should be housed or promoted on New York State chapter social platforms.
- The discussion of internal Zeta business is not for the public to see or have the ability to participate in. All precaution should be taken to make sure public discourse on these platforms is at a minimum.
- Images and photos used on social platforms should not portray Zeta Phi Beta Sorority, Inc. and its members in a negative or vulgar way.
- It is strongly encouraged that chapters within New York State that have a social media presence engage and share information with other chapters within the state and beyond in order to help promote sisterhood.

Chapter Events

It is strongly encouraged that chapters within New York State host events on a consistent basis that are shared with the community. This helps spread the mission and good will of the sisterhood to different organizations and individuals who would otherwise not be exposed to the sorority's higher ideals.

- The branding of Zeta Phi Beta, Inc. should be consistent with National guidelines. "Zeta Phi Beta Sorority, Inc." or "ΖΦΒ" should be the most prevalent logo presented at the event.
- Sorority logos, shields, or other representations should not be combined with any other organizations logos, shields, or other representations. Zeta Phi Beta Sorority, Inc. is a sole entity and branding should reflect this.
    - The only exception is when co-hosting events with Phi Beta Sigma Fraternity, Inc.
- Flyers for chapter events should be shared with a member of the Marketing and Public Relations committee so that NYS social media channels can appropriately help advertise the event.

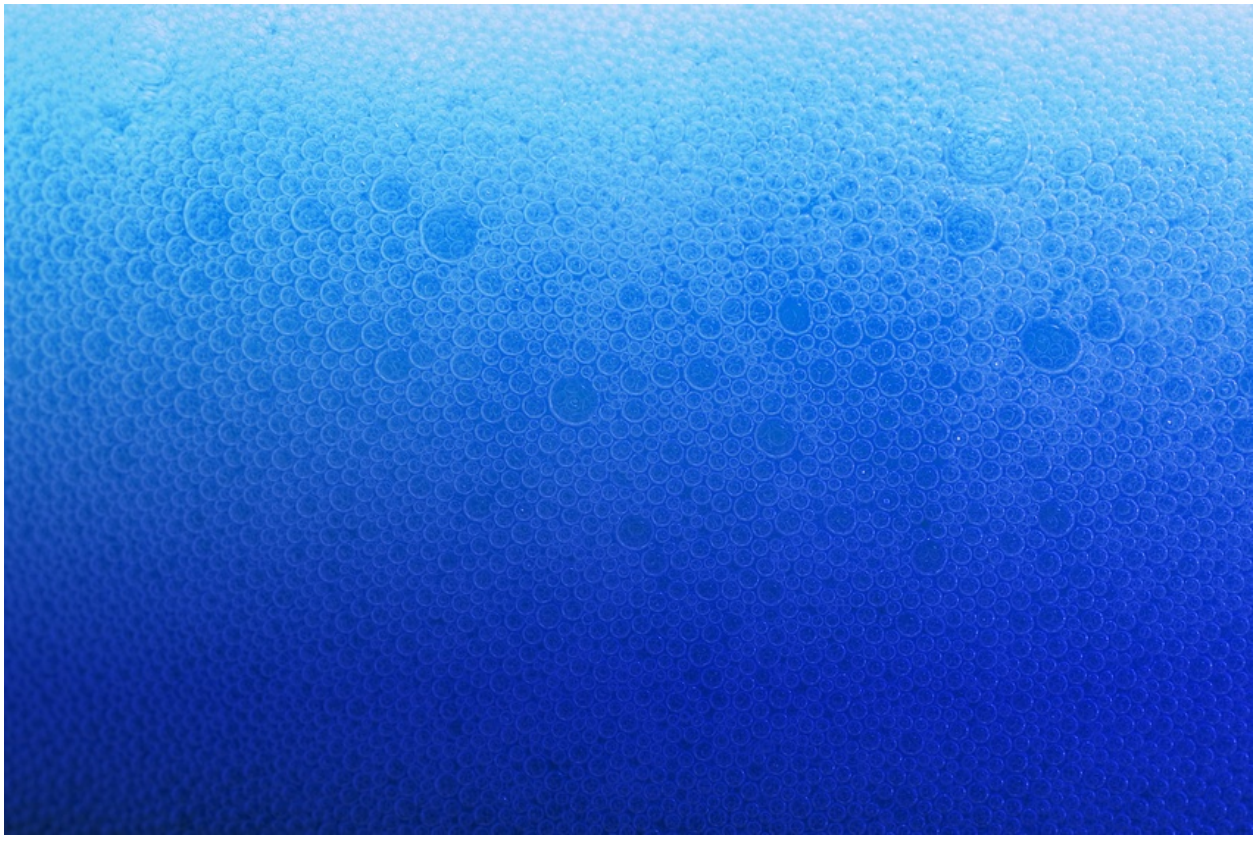
- Chapters are responsible for the insurance and care of event attendees. All proper documentation should be collected in advance, if necessary, to protect the liability of the chapter.
- Chapters must do their due diligence to collect signed agreements from attendees before using their photos for any promotional use.

Strategic Partnerships and Sponsorships

For chapter events that require a chapter to seek outside sponsorship or partner with an outside organization, it is advised that chapters take special care when forming these relationships. Chapter members should keep in mind that they represent the entire sorority and their actions can greatly impact the likelihood that a potential partner would choose to work with us again.

- Chapters should check with a member of the Marketing and Public Relations committee for guidance on how to properly approach potential sponsors and to see what materials could be useful to send on behalf of Zeta Phi Beta, Inc.
- Sponsor logos, branding, or other representations should not overshadow sorority branding. If a chapter of Zeta Phi Beta Sorority, Inc. is serving as host, then the event must be branded as such.
    - Sponsor logos should be placed underneath sorority branding and should be smaller in physical size.
- Potential partners/sponsors should be aligned with the sorority's mission, principles, and higher ideals. Partners and sponsors that promote an adverse message should be avoided.

WEBSITE/EMAIL/SOCIAL MEDIA POLICIES



Introduction

This document has been written to create a uniform guideline for all chapters within New York State to adhere to when designing and/or editing a new website and/or sending out emails under the purview of Zeta Phi Beta Sorority, Incorporated. This is an abbreviated document – a more detailed one is currently being compiled by the National Publications Team and will be provided upon its release.

Website Guidelines

BEFORE CREATING YOUR SITE:

1. **Determine who your audience is.** Your viewership could be anyone from an interested party to someone with negative ideas about Zeta Phi Beta Sorority, Incorporated. Keep in mind that your website may be a person's first and only introduction to the Sorority.
2. **Determine who will build and maintain your site.** Make sure that this person has the proper training and knowledge to make sure your site adheres to the rules set forth by the Sorority and the State.
3. **Determine what your goal for the site is.** Is the purpose of your site just an informative tool about your chapter and the Sorority? If so, make sure to include at least the following;
    a. General information about Zeta Phi Beta Sorority, Incorporated;
    b. A list of chapter awards and/or events;
    c. A history of your chapter;
    d. List famous Sorors from your own chapter;
    e. Scholarship opportunities from your chapter;
    f. Contact information for your chapter (to allow visitors to submit comments, questions, and/or suggestions).

Please note that "Zeta Phi Beta Sorority, Incorporated web sites may not be used for commercial, religious, or political purposes. These sites shall not include product endorsements or personal/commercial advertising."

IF YOU WISH TO HAVE A ZETA PHI BETA SORORITY, INCORPORATED WEBSITE, IT/YOU MUST:

1. Register the web address with the International Website Development Team of the Sorority by sending an email to webteam@zphib1920.org;
2. Comply with university/college policies (if applicable);
3. Comply with NPHC rules and all applicable federal, state, provincial, and local laws;
4. Include a contact email address for website visitors to submit comments, suggestions, complaints, and questions;

5. Protect the privacy and safety of the Sorority and its members by not publicizing personal information (e.g. name, email address, group photographs, where individuals may be identified, etc.) without permission of the members.

Zeta has intellectual property interests in its symbols, ceremonies and other interests, which need protection from legal risks. Accurate, complete and current information is critical to legal protection. International Headquarters will be the sole source of the following topics as they appear on any home page. Regions, State and locals chapters and individual members with home pages are permitted to share the following information via **links** to the National home page:

- Mission of the Sorority;
- History of the Sorority;
- Membership Demographics;
- How to Become A Member;
- The Sale of Zeta Publications/Artifacts;
- Announcements of any kind from the International Office.

DESIGNING YOUR WEBSITE:

- **Your Domain Name.**
  Register a professional domain name is possible. It's much cleaner to have your website name be http://www.zphib[chapter_name].org instead of https://sites.google.com/site/chapter_name.
- **Fonts and Colors.**
  Make sure to use formats and colors that are appropriate and "web-friendly." Standard fonts such as Arial and Times New Roman are good selections. Try to minimize the number of different fonts you use within
- **Site Structure.**
  Make sure your site structure is organized and clean. It should be easy for the visitor to navigate through your site with ease. Make sure to include a menu or table of contents to make it easier to navigate through the site.
- **Graphics.**
  While graphics make a site interesting and entertaining, they can also slow down a site from loading. You'll want to keep your graphics small and optimized for the web.
- **Check, Double Check, and Triple Check.**
  You'll want to make sure that your pages are error-free. Have someone else review the site to make sure there are no grammatical errors and that all links are working correctly.
- **Keep It Fresh.**
  Make sure to continuously update your website. Create a regular schedule for checking/updating the site where outdated information is removed/updated and images are refreshed as necessary.

SO WHAT INFORMATION/IMAGES CAN BE INCLUDED ON A WEBSITE?

- The Dove of Peace;
- The White Rose;
- The Torch of Wisdom;
- Photographs of chapter activities and public service events (*professional photographs are strongly suggested*) wearing Sorority colors;
- Chapter histories;
- Chapter charter members and founders, including pictures;
- Past National Presidents (only if Soror(s) were initiated through that particular chapter);
- Chapter officers;
- Region, States, Chapters and Affiliates' names must follow the naming convention of Zeta Phi Beta Sorority, Inc. (For example: Zeta Phi Beta Sorority, Inc. Upsilon Theta Zeta Chapter; not the Upsilon Theta Zeta chapter of Zeta Phi Beta Sorority, Inc.)

SO WHAT INFORMATION/IMAGES CANNOT BE INCLUDED ON A WEBSITE?

- Individual pictures of chapter members, unless a photo release form is on file with the chapter and National Headquarters;
- Physical home addresses or personal phone numbers;
- Photographs of Sorors consuming food and or beverages;
- Specifics regarding the location and time of non-public chapter meetings. (To obtain this information, visitors should be encouraged to email or call the chapter's voicemail or otherwise);
- Details of MIP schedules, etc. without the approval of the campus NPHC or other organization that oversees such activities on campus;
- Copyrighted material (music, text or otherwise) or trademarks owned by other sources without authorization of the copyright/trademark owner (including music);
- Copyrighted material from publications of Zeta Phi Beta Sorority, Incorporated;
- Links to other web sites that are not consistent with Zeta Phi Beta Sorority, Incorporated policies. Web pages having such links will be considered in violation of these policies;
- References to alcoholic beverages or illegal drugs. These may include party photos, T-shirts, event names, beverage containers, etc.;
- Product endorsements or other personal/commercial advertisements may not be included on a Zeta Phi Beta Sorority, Inc. site without approval. Requests may be submitted to Zeta Phi Beta Sorority, Inc. International Headquarters;
- Political endorsements;
- Information or photographs pertaining to Zeta Phi Beta Sorority, Inc. rituals;
- Confidential Sorority, internal association, or chapter matters may not be addressed on the website.

- Cats or kittens;
- Electronic "chain letters" must not be posted on a Zeta site or forwarded by email. Many such letters are vehicles for computer viruses;
- Text or images from pages from the official Zeta Phi Beta Sorority, Incorporated website (and/or Regional Websites) like the history section or photographs or graphics (linking to these pages is allowed);
- The Official Sorority Shield;
- Motto or Oath;
- Passwords or grip;
- Usage or references to "Zeta Phi Beta Sigma" (ZPBS or ΖΦΒΣ).

ALWAYS REMEMBER:

Anything that is posted on the Internet is accessible any and everywhere. You are representing Zeta with every word posted under the Sorority's banner. Make sure that it is in good taste and represents the ideals of the Sorority at all times.

Email Etiquette

SENDING OUT AN EMAIL (INTERNALLY):

1. **Include the confidentiality statement.** When sending out an email internally to members of the Sorority and/or the chapter, please make sure to include the confidentiality statement which is as follows:
   «CONFIDENTIALITY STATEMENT:

The information contained in any communication distributed by **Zeta Phi Beta Sorority, Incorporated: Chapter Name**, including attachments, is strictly confidential and intended solely for delivery to, and authorized use by, the identified addressee(s), as it may contain legally privileged and/or confidential information. If you are not the intended recipient of the communication, you are hereby notified that any reading, disclosure, dissemination, distribution or copying of the communication, and any attachments thereto, is strictly prohibited. If you have received the communication in error, please notify the sender immediately by telephone and return the original communication to us at the address above. In addition, please delete the message, and any copies and printouts thereof, from your records. »

2. **Professionalism at all times.** Emails going out using the chapter's name should not be about personal business. When writing or receiving a quick note and/or reminder to someone within the Sorority, make sure to maintain a professional tone – and read the email as such. Do not take offense to content in the email as it is written for business purposes alone.

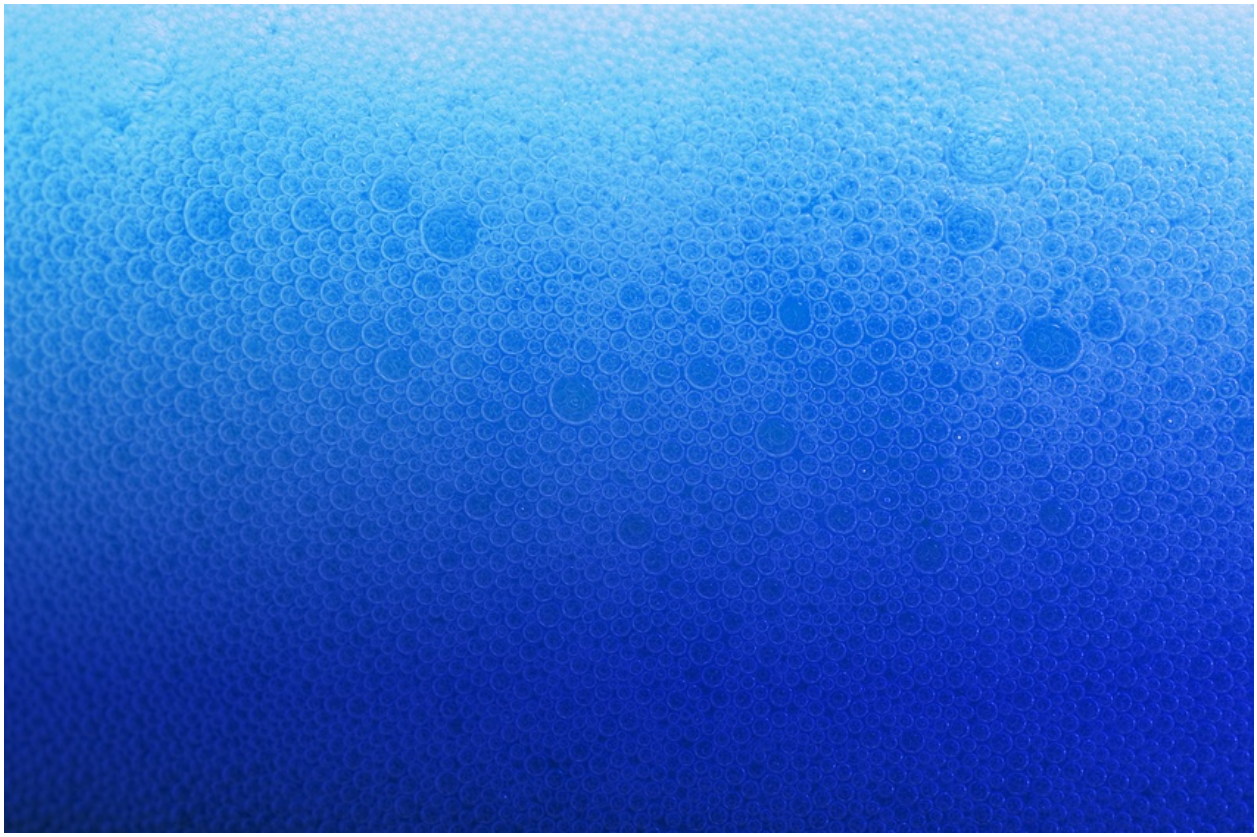
SENDING OUT AN EMAIL (EXTERNALLY):

1. **Use an appropriate email address.** If the chapter has emails using the website domain, these emails should be used for correspondence. If no such emails exist, you can create an alias using email service providers such as Gmail.
2. **Check your email regularly.** Chapter emails should be checked regularly – especially information emails. Respond to emails – especially those requiring information - within a timely manner – even it is just to acknowledge receipt of the email.

QUESTIONS/CONCERNS:

If you have any questions and/or concerns about your website, do not hesitate to contact the New York State Web Mistress at nyswebmistress@gmail.com.

CHARTER/ CHAPTER REACTIVATION PROCEDURES



NYS Charter /Reactivation Process

Sorors interested in chartering or reactivating a chapter will be responsible for developing a strategic plan to include short term/long term goals. The Plan should include the following components which will address sustaining a chapter over the next five (5) years.

Phase One – First 3 months

- **Chapter Officers** - decision to be made on who will be the officers of the chapter
- **Chapter Budget** – develop an operating budget
- **Membership** – develop a plan on how to increase/maintain membership
- **Fundraising** – develop plans which can be utilized to help increase chapter funds
- **Community Service** – research the area in which the chapter will be situated to see what type of community initiatives would be viable

New York State Director will assign a mentor to work with the members

Phase Two – Second 3 months

- Mentor will work with the members to develop chapter constitution and bylaws
- Mentor will work with the members to develop chapter Standard Operating Procedures
- Mentor will assess chapter members' training needs and make recommendations and assist in the acquisition of ancillary personnel with appropriate skills/abilities to meet the training initiatives on a timely basis

Six months after request for new charter or reactivation is made the request will be come up for review once phases one and two have been completed satisfactorily. Chapter strategic plan and chapter member training will be reviewed by the State Director for approval.

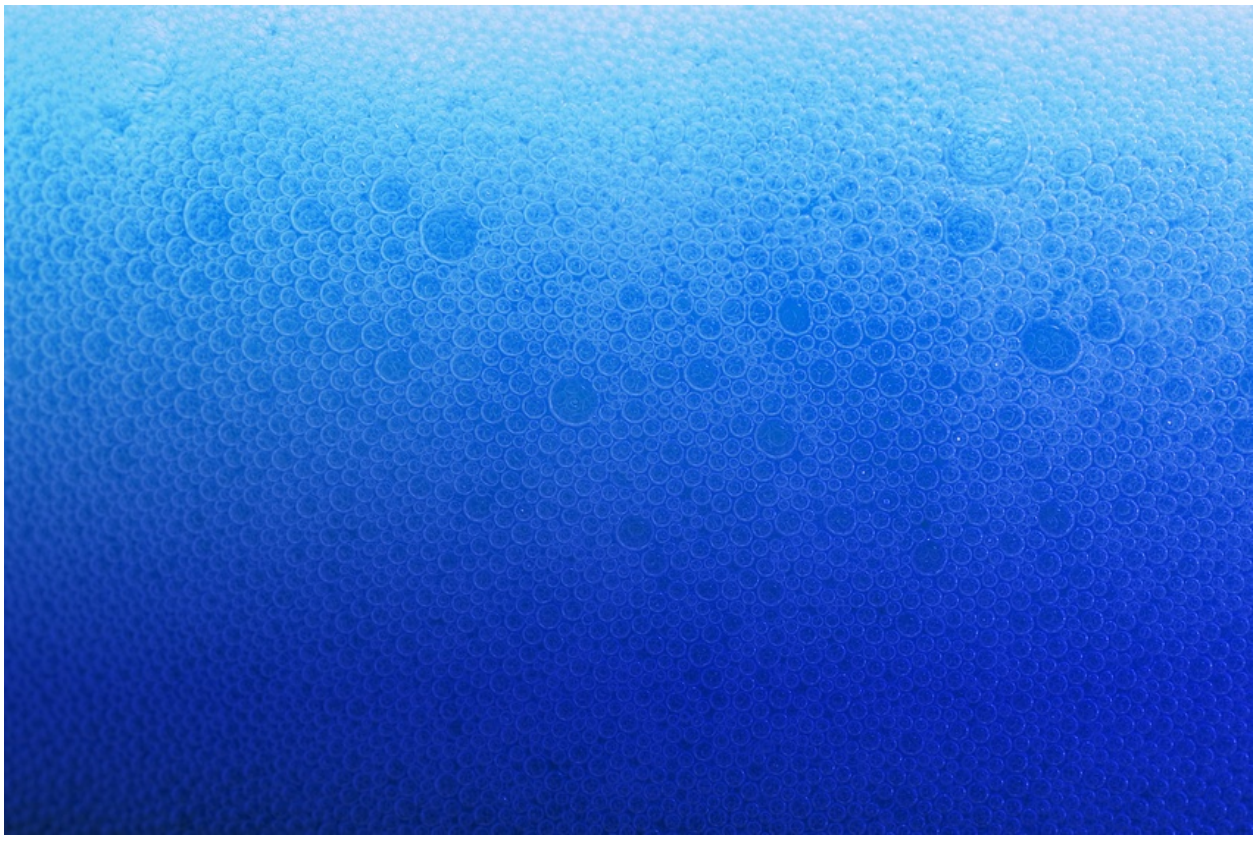
Mentor will follow up with the newly charted and or reactivated chapter on a monthly basis for one (1) year after activation.

Phase Three – First year after charter and or reactivation

- Mentor will submit a monthly report to the NY State Director on the progress of the chapter
- Mentor should attend the first three meeting of the chapter to ensure the chapter members are level set and on the right road
- Mentor should then schedule periodic chapter visits for the balance of the sorority year in order to assess the progress of the chapter
- Mentor will submit wrap up report to the State Director at the conclusion of the 1st year observation period

If the mentor feels observation should be extended for a longer period of time at the end of the first year she shall include her recommendation in her final wrap up report to the State Director for consideration.

PROTOCOL PROCEDURES



New York State Protocol at a Glance

Protocol is defined as the code of ceremonial forms and courtesies, or precedence accepted as proper and correct in official dealings; as between heads of state or diplomatic officials. The expected outcome is uniformity and efficiency in accomplishing goals by applying tenets of protocol in communication, introduction, lineup, seating, utilizing Zeta documents, and carrying out the official business of the sorority.

Communication of official business between the National Headquarters and local chapters is conducted through the chapter Basileus. The Basileus ensures that material from the International Grand Basileus, Regional Director, and State Director is distributed to the members. The Basileus should make certain that required action is taken on the directives from each of these levels.

Use of Greek Terms: Greek wording should be reserved for inter-sorority occasions. Public mail news releases, etc. should have regular terminology for officers rather than Greek terms.

Addressing Sorors/Sigma Brothers

- There is no abbreviation for the word "Soror".
- When referring to a soror who has a Doctorate degree, she is referred to as "Dr**…."**, never "Soror Dr…".
- When addressing or introducing sorority officials in a public venue, use the English name for the officer, not the Greek name (e.g**., ...** and now ladies and gentlemen, I introduce you to **……**International President.
- Never introduce as soror as "Ms. or Mrs.
- When introducing Phi Beta Sigma Brothers in a public venue, introduce them as: "Sigma Brother Dr**…**, Beta Psi Sigma, Chapter President", or "Sigma Brother...**"**
- Never introduce a Sigma Brother as "Mr."

Introductions: The chapter president should introduce National, Regional, or State officers visiting a chapter, except when she chooses to delegate the responsibility. The order should always be:

- **National:** International Grand Basileus, Past Grand Basilei, elected officers, appointed officers, local graduate/undergraduate Basilei, elected officers and appointed officers.
- **Regional:** Director, State Directors, elected officers, appointed officers, local graduate/undergraduate Basilei and elected officers.
- **State:** Director, elected officers, appointed officers, local graduate/undergraduate Basilei and elected officers.
- **Local:** Graduate or Undergraduate Basilei, elected local officers, appointed local officers, national, regional and state officers present.

By virtue of their ranking in the sorority, the Grand-Basileus, past Grand Basilei, National, Regional and State officers are to be extended various courtesies.

National and Regional officers visiting New York State should be introduced by the New York State Director except when she chooses to delegate the responsibility.

The New York State Director is the first lady of the State, its highest ranking officer, and the administrator of all New York State related business.

When visiting a local chapter, she should be afforded all the courtesies commensurate with her position in the sorority. The chapter president should introduce the New York State Director when she visits a chapter or chapter sponsored events, except when she is unable to do so and has delegated that responsibility.

Courtesies which should be extended are as follows:

- Chapter/State Representative should meet the State Director upon arrival and provide transportation until her departure, and to the final point of departure.
- Fruit baskets, beverages (juice, ginger ale, ice, etc.)
- Corsages should be provided. The official flower is the white rose. If these are not available, carnations or other flowers should be substituted.
- Various forms of gifts should be presented dependent upon the occasion.
- Sight-seeing should be arranged to enable her to become familiar with the locality (Optional).
- Depending upon the nature of her visit, local dignitaries should be informed of her arrival and provided an opportunity to meet her.
- Other forms of entertainment should be provided as appropriate, (e.g. dinners, brunches, theater parties) to enable her to relax and socialize with sorors and other guests.
- She should be provided an opportunity to address the assemblage on all programs and be recognized by the body.
- A personal escort should be provided to and from all functions.

Note: If the State Director is the official guest of the Region, State or Chapter, specific amenities should be provided as listed above.

State Conferences/Meetings

Registration
The Grand Basileus, visiting National Officers, Past Grand Basilei, Regional Director, and State Directors should receive complimentary registration if invited as guests. Complimentary registration should also be provided to Regional officers, State Officers, if funds are available in the budget.

Housing
The Grand Basileus, past Grand Basileus, Regional Director, State Director, and guest National Officers should receive complimentary housing (The latter is optional).

Head Table Seating
The luncheon and/or banquet seating should be reserved for the Grand Basileus, her escort, National Officers, Regional Officers, Regional and State Directors, local host chapter Basileus, the Marshal, Guest Speaker, and local dignitaries. (Special tables may be provided for national Officers).

Courtesies should be extended as requested by the State Director and/or Executive Board of the New York State.

Sigma Brothers

Sigma's National president should always be seated in a position of high honor close to our Grand Basileus to demonstrate the strong bond emanating from our constitutionally based sister-brother relationship.

Zetas should rise upon the initial entrance and the introduction of the National President of Phi Beta Sigma Fraternity, Inc.

He, or his representative, in his absence, should be provided with a white carnation boutonniere. He should be afforded an opportunity to provide greetings or remarks at some appropriate time in the program.

The local chapter of Phi Beta Sigma Fraternity, Inc. should be contacted and whenever possible, included in the planning and activities of Zeta events. They should be both publicly recognized and thanked for their participation in the effort to make Zeta's function(s) successful. In turn, the Zetas should reciprocate and help the Sigmas whenever they put on an activity. Special effort should be forthcoming from the Zetas whenever the Sigmas host a Conclave, Regional, State meeting or other event that would bring Sigma VIP into the area.

Dress for Zeta Functions

The occasion, the invitation or local customs and traditions dictate the appropriate attire:

- **Formal** (strict): properly requires full dress tails for the men and gowns for the ladies (Known as Black Tie)
- **Formal** (contemporary interpretation): normally requires tuxedos or dark suits for men and for the women, after five attire, gowns, or cocktail dresses for dances, dinners and other special events.

- **Business attire:** Suits, pantsuits, skirt and blouse, sweaters may be considered informal wear suitable for attending meetings, conferences, luncheons, etc. **Shorts and blue jeans are NOT acceptable at State, Regional or National Leadership Conferences during business meetings, luncheons or banquets.**
    - If in doubt about what is appropriate attire, dress up rather than dress down. Also check with your Basileus or advisor on the proper attire for the occasion.

Colors: What is the Policy?

- **Zeta:** Royal Blue and White (attire and corsages)
- **Flower:** White Rose

- **Amicae:** Predominantly Light Blue with small amount of Royal Blue trim.
- **Flower:** White Carnation (Light blue ribbon only)

White is mandatory at:

- Renewal of Pledge
- Necrology service
- Ceremonial Rituals Numbers 1 and 2 of the Membership/Selection Intake Process
- Ceremony for organizing a chapter

Black is mandatory at:

- Burial service for a soror.

Wear blue at:

- Zeta functions
- Sigma functions
- Any other time

APPENDIX

SOP Revision History Log

Zeta Phi Beta Sorority, Incorporated
NEW YORK STATE

SOP Revision History Log

Status – This is the first edition of the New York State SOP Manual and it will be presented to the body on MM/DD/YYYY. This document will need to be revised and updated as needed and to ensure all revisions are properly recorded, below is a revision history log that will be used to capture all revisions.

The table below records the version number, revision date, author and a brief summary of the changes that have been made to the SOP. The revision history log must be completed whenever an alteration to the version number is made (including approval for the first time.)

Revision History Log			
Version#	**Date/Revision**	**Written/Revised by**	**Revision Description**
1st ed.	02/17/14	Nieja Robinson	Add SOP History Log to Appendix

--, New York State Director
-- Chair/Author

SOP Amendment Form

Zeta Phi Beta Sorority, Incorporated
NEW YORK STATE

Standard Operating Procedures Amendment Form

All proposed amendments must be submitted to the policies and procedures committee for presentation to the Executive Board. Proposed amendments must be submitted in the format indicated below and submitted to the SOP Policy and Procedures Coordinator ***no later than --.***

Date: _____

Proposer's Name: _____

Email: _____

Chapter: _____

Page	Amendment	Rationale

SOP Correction Form

Zeta Phi Beta Sorority, Incorporated
New York State

Standard Operating Procedures Correction Form

Date Received by SOP Policy & Procedures Coordinator: _____

Name: _____ Chapter: _____

Email/Phone Number (preferred) _____ / _____

Please provide the Section (i.e. Elected Officers), the Subsection (i.e. Skills/Knowledge) the paragraph, the line and then your correction. Please PRINT so information is legible.

Page	Section	Subsection	Paragraph	Line	Correction
89	Financial Obligations to Elected and Appointed Positions	MD State Leadership Conference	N/A	2	Capitalize "Elected"

Zeta Phi Beta Sorority, Inc
New York State

(Officer Name)
(Title)

Officer Report
YYYY-YYYY

(Insert Name)
International Grand Basileus

(Insert Name)
Atlantic Region Director

(Insert Name)
New York State Director

Zeta Phi Beta Sorority, Inc.
New York State
Officer Report YYYY-YYYY

OFFICER CONTACT FORM

Officer Name:
Officer Title:
Address:
City, State, Zip Code:
Telephone:
Home:
Work:
Cell:
Email:
Personal:
Officer:
Chapter Name:

Zeta Phi Beta Sorority, Inc.
New York State
Officer Report YYYY-YYYY

SUMMARY OF ACCOMPLISHMENTS

This report provides state officers with the opportunity to reflect upon actual work completed this sorority year. Please complete this report (with additional sheets if needed) to describe:

1. accomplishments related to your position;
2. accomplishments related to established goals and/or performance expectations;
3. future goals and/or performance expectations;
4. training and development needs, if any.

I. Please list your goals and/or objectives relative to your position for the YYYY-YYYY sorority year.

II. Please provide any specific data, assessment or metric that demonstrates progress towards your goal or strategy over the past sorority year.

III. Please describe in bullet form, what has been accomplished relative to your position that has moved New York State forward towards the accomplishment of the overall goal(s) of the State and your position from MM/DD/**YYYY – MM/DD/YYYY**. Include workshops conducted, events attended, etc.

IV. Please describe any partnerships or co-sponsored events you coordinated on behalf of the state with Greek and non-Greek (governmental, nonprofit, corporate) organizations. Please provide details of the event (i.e. date, time, location and a brief summary of the event)

V. Please indicate what you plan to accomplish over the balance of the YYYY-YYYY sorority year (MM/YYYY – MM/YYYY).

Zeta Phi Beta Sorority, Inc.
New York State
Officer Report YYYY-YYYY

VI. Please complete the following synopsis of the programs instituted by your office.

Programs/Activities/ Projects	Organization/Community Issue(s) or Concern(s) Addressed	Performance Indicator	Cost (Actual and/or Value of In-kind Services)	Remarks/Next Steps
Donated items to a woman's shelter	***Domestic Violence***	***150 victims of domestic violence received care packages***	***$1,500***	***Received a thank you letter from the shelter. Plan to return next year***

VII. Self Assessment

A self assessment is an officer's narrative description of accomplishments related to their position objectives. Please complete a self-assessment statement which includes your priorities for the year, your accomplishments and an impact statement.

Purpose

The purpose of an officer's self assessment is to assist officers in preparing for performance evaluations. Being asked to complete a self assessment invites you to be part of a discussion about your performance over the past year. Your self assessment can help you to reflect on your performance in the past year and to document your accomplishments and their impact on Zeta Phi Beta Sorority, Inc. in the state of New York. It is also an opportunity to communicate your understanding of your role(s), duties and responsibilities, performance standards, expectations, and your accomplishments in during this sorority year.

Preparation

- As you prepare to write your self assessment, begin by reviewing documentation about your work such as your objectives, and office goals and mission.
- Review your performance log tracking your major accomplishments and work throughout the year to help you reconstruct your performance over the past year. If not, take time to review your calendar and other records of your work.
- Reflect on the purpose of your position and how it contributes to the mission of Zeta Phi Beta Sorority, Inc. – New York State.

Writing Your Self Assessment

- Identify your position priorities over the past year based on your position job description.
- For each priority, describe your work and accomplishments. Questions to address include:
    - What exactly was the work or task?
    - How is success measured? Possibilities include: impact, quantity, quality, accuracy, timeliness, budget, sorority member and/or community constituent satisfaction and a combination of these or other measures.
    - What was the impact of your work on the state of New York and the Zeta Phi Beta Sorority, Inc., as a whole?
    - What obstacles did you have to overcome?

Tips

- Be specific. Don't say, "Supported the State's Founders' Day ZHOPE project." Instead, indicate what you did specifically and how it supported your overall goals.
- Be objective and stay focused on results.
- While it is important to be thorough, a self assessment doesn't have to be long to be effective.

Sample Accomplishments and Impact Statement

When reflecting on your accomplishments, describe the task, how you were successful, and the impact of this work. Please see the below sample to support you in your preparation.

Description: *Designed and led training of chapter Basilei on efficiently and accurately preparing a budget report.*

Impact: *Chapters were able to apply what they learned leading to more accurate financial management in direct support of our goal to improve chapter management.*

Example of Scholarship Report

	Zeta Phi Beta Sorority, Incorporated			
	New York State			
	Scholarship Fund			
	(Include Time Frame)			
Beginning Balance				
Income				
Date	**Credit Activities**	**Amount**		
MM/YY	Interest			
MM/YY	Interest			
MM/YY	Interest			
	Total Income			**$ -**
Expense				
Date	**Debit Activity**	**Amount**		
MM/YY	Dr. Deborah Cannon Wolfe Scholarship Disbursement			
	Total Expense			**$ -**
Ending Balance				**$ -**
Upcoming Activity:				
MM/YY	Disbursement of $500 for Pamela Profit Scholarship award			

Notice of Bounce Check

(Date)

(NYS Tamias' Name)
Zeta Phi Beta Sorority, Inc.
New York State Tamias
(NYS Tamias Address)
(NYS Tamias Telephone xxx-xxx-xxxx)

(Addressee)
(Chapter's Name)
(Chapter's Address)

Dear *(Chapter's Name)*:

This letter is to kindly notify you that we are returning the check issued by *(you and/or chapter's name)* as a payment toward your *(State assessment, Founders Day ticket, NYS Leadership Conference, etc)*. The check made payable to Zeta Phi Beta Sorority, Inc. - New York State in the amount of *($___)* has been return due to insufficient funds.

Upon reissuing of payment, I ask that this amount of *($____)* be paid by a certified check or money, plus the $10.00 fee for our service charge for the returned check.

If you have any questions, you can contact me at the above telephone number during office hours.

Thank you.

Sisterly,

(Tamias' Name)

Notice of Chapter Credit

(Date)

Dear *insert chapter name* Chapter:

Thank you for your timely submission of your state assessments. Please be advised that you have overpaid your assessments for the *insert reporting year* reporting year. *Insert the category of overpayment and amount that was overpaid*. Please be reminded that there are no refunds and therefore your chapter has a credit in the amount of *$insert amount here*. This credit must be used this sorority year (*insert year here)* or the next sorority year (*insert year here).* Should the credit not be used in this time frame, you will forfeit your credit. Thank you in advance for your quick response in this matter.

Sisterly,

Soror Insert YOUR name here
NYS Tamias Grammateus

Notice of Balance Due

(Date)

Dear *insert chapter name* Chapter:

Thank you for your timely submission of your state assessments. Please be advised that your state assessments are incomplete for the *insert reporting year* reporting year. *Insert which fee the chapter is missing and the amount of the fee*. Please be reminded that you have *30 business days* after the receipt of this notification to clear this debt. Should the debt not be cleared, your chapter will be considered unfinancial until debt is cleared.
Thank you in advance for your quick response in this matter.

Sisterly,

Soror Insert YOUR name here
NYS Tamias Grammateus

Operational Budget Master Line Item List

Line Items	Description	Designated Signors
Income		
Chapter Tax:		
Graduate Chapters	Yearly assessment of New York State Graduate Chapters	No Signatures necessary
Undergraduate Chapters	Yearly assessment of New York State Undergraduate Chapters	No Signatures necessary
Scholarship		
Graduate Chapters	Assessment of New York State Graduate Chapters- Even Years	No Signatures necessary
Undergraduate Chapters	Assessment of New York State Undergraduate Chapters- Even Years	No Signatures necessary
Operational Tax		
Graduate Chapters	Yearly assessment of New York State Graduate Chapters	No Signatures necessary
Undergraduate Chapters	Yearly assessment of New York State Undergraduate Chapters	No Signatures necessary
Per Capita		
Graduate Members	Yearly assessment of New York State Graduate members	No Signatures necessary
Undergraduate Members	Yearly assessment of New York State Undergraduate members	No Signatures necessary
Late Fees	Penalty for late payment of assessment fees	No Signatures necessary
Founders' Day	Income from Founders' Day celebrations. Sub items may be added ad hoc	No Signatures necessary
State Meeting	Income from Annual State Meeting. Sub items may be added ad hoc	No Signatures necessary

Executive Board Meeting	Income from Executive Board Meetings. Sub items may be added ad hoc	No Signatures necessary
Fundraisers	Income from Fundraiser events. Sub items may be added ad hoc	No Signatures necessary
Expenditures		
Executive Board		
State Director Clerical Services	Clerical services purchased by the State Director	State Director
State Director Gifts	Gifts purchased on behalf of the State	State Director
State Director Lodging	Lodging for the state director incurred in the course of business	State Director
State Director Meals	Meal costs incurred during the course of business	State Director
State Director Office Supplies	Office supplies purchased by the state director	State Director
State Director Postage	Postage costs related to the course of business by the State Director	State Director
State Director Printing	Printing costs related to the course of business by the State Director	State Director
State Director Telephone	Mobile services expenses incurred by the State director	State Director
State Director Travel	Travel expenses incurred by the State Director n the course of business	State Director
Grammateus	All expenses incurred by the officer in the course of business	Grammateus
Phylacter	All expenses incurred by the officer in the course of business	Phylacter

Tamias	All expenses incurred by the officer in the course of business	Tamias
Tamias- Grammateus	All expenses incurred by the officer in the course of business	Tamias- Grammateus
Undergraduate Rep	All expenses incurred by the officer in the course of business	Undergraduate Rep
Appointed Officers		
Amicae Coordinator	All expenses incurred by the officer in the course of business	Amicae Coordinator
Geographic Coordinator	All expenses incurred by the officer in the course of business	Geographic Coordinator
Youth Coordinator	All expenses incurred by the officer in the course of business	Youth Coordinator
Public Relations	All expenses incurred by the officer in the course of business	Public Relations
Initiatives		
Exec. Board Meeting	All expenses related to the planning and hosting of the Executive Board meeting	State Director, Tamias
Basilei Retreat	All expenses related to the planning and hosting of the Basilei Retreat	State Director, Tamias
Z-HOPE	All expenses related to the planning and hosting of Z-HOPE initiatives	Z-HOPE Chair
State Meeting	All expenses related to the planning and hosting of the Annual State Meeting	State Director, Tamias
Founders' Day	All expenses related to the planning and hosting of Founders' Day celebrations	Founders' Day Chair
Fundraisers	All expenses related to the planning and hosting of fundraiser events	Fundraiser Chair

Operational Expenditures		
Bank Fees	Bank Fees related to the operational account	No Signatures necessary
Campaign Donations	Donations in support of campaigning sorors	Tamias
Investigations	Expenses related to investigations. Does not include travel, lodging or meals.	State Director
Journal Ads	Purchase of journal ads	State Director, Pubic Relations, Tamias
Miscellaneous	All expenses not related to any other budget line item but incurred through ordinary course of business	State Director, Tamias
Scholarship	Scholarships given	No Signatures necessary
Storage	Storage fees	State Director, Tamias
Travel	Travel expenses incurred by all officers excluding the State Director. Does not include lodging. Incurred in the course of business	All officers excluding State Director
UPS Store- Business Address	Expenses related to the rental of PO box	State Director, Tamias
Website	Expenses related to the maintenance of State website	Web Mistress

Tamias Grammateus Excel Spreadsheets

New York State Graduate Chapters FY YYYY-YYYY Financial Assessments

Zeta Phi Beta Sorority, Inc. ~ New York State

MM/YYYY – MM/YYYY

Chapter	Check/MO#	Received	Members	Chapter Tax	Per Capita Tax	Operational Tax	Scholarship	Other	Total	Receipt #
Delta Alpha Zeta									$0.00	
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Delta Beta Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Delta Mu Zeta									$0.00	
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Gamma Xi Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Iota Pi Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Iota Theta Zeta										

Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Kappa Epsilon Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Kappa Upsilon Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Kappa Xi Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Nu Phi Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Nu Psi Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Omicron Epsilon Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Phi Omega Zeta										

Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Phi Zeta Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Psi Omega Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Rho Omega Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Rho Omicron Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Rho Psi Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Sigma Kappa Zeta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Sigma Nu Zeta										
Chapter Total			0	$0.00	$0.00	$0.00			$0.00	

Tau Gamma Zeta										
Chapter Total			0	$0.00	$0.00	$0.00			$0.00	
Theta Alpha Zeta										
Chapter Total			0	$0.00	$0.00	$0.00			$0.00	
								GRAND TOTAL	**$0.00**	

New York State Undergraduate Chapters FY YYYY-YYYY Financial Assessments

Chapter	Check/MO#	Received	Members	Chapter Tax	Per Capita Tax	Operational Tax	Scholarship	Other	Total	Receipt #
Chi Lambda										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Delta Upsilon										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Epsilon										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Epsilon Nu										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Eta Kappa										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Gamma Upsilon										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Omega Lambda										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Omicron Alpha										

Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Omicron Beta										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Omicron Mu										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Omicron Tau										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Rho Xi										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Theta Kappa										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Zeta Iota										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	
Zeta Kappa										
Chapter Total			0	$0.00	$0.00	$0.00	$0.00		$0.00	

GRAND TOTAL	**$0.00**

Summary of Payments Collected as of MM/YYYY

Total Chapter Tax Received	$0.00
Total Per Capita Tax Received	$0.00
Total Operational Tax Received	$0.00
Total Scholarship Fee Received	$0.00

FY YYYY-YYYY	$0

New York State Chapter Status as of MM/YYYY

Graduate Chapters	Members
Delta Alpha Zeta	0
Delta Beta Zeta	0
Delta Mu Zeta	0
Gamma Xi Zeta	0
Iota Pi Zeta	0
Iota Theta Zeta	0
Kappa Epsilon Zeta	0
Kappa Upsilon Zeta	0
Kappa Xi Zeta	0
Nu Phi Zeta	0
Nu Psi Zeta	0
Omicron Epsilon Zeta	0
Phi Omega Zeta	0
Phi Zeta Zeta	0
Psi Omega Zeta	0
Rho Omega Zeta	0
Rho Omicron Zeta	0
Rho Psi Zeta	0

Undergrad Chapters	Members
Chi Lambda	0
Delta Upsilon	0
Epsilon	0
Epsilon Nu	0
Eta Kappa	0
Omega Lambda	0
Omicron Alpha	0
Omicron Beta	0
Omicron Mu	0
Omicron Tau	0
Gamma Upsilon	0
Rho Xi	0
Theta Kappa	0
Zeta Iota	0
Zeta Kappa	0
Total	**0**

Financial Chapters	
Undergraduate	0
Graduate	0
Total	**0**

Unfinancial Chapters

Undergraduate

Graduate

Total

Inactive Chapters

Undergraduate

Graduate

Total 0

New York State Financial Sorors FY YYYY-YYYY

Delta Alpha Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Delta Beta Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Delta Mu Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Gamma Xi Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Iota Pi Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Iota Theta Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Kappa Epsilon Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**

Kappa Upsilon Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Kappa Xi Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Nu Phi Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Nu Psi Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Omicron Epsilon Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Phi Omega Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Phi Zeta Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**

Psi Omega Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Rho Omega Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Rho Omicron Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Rho Psi Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Sigma Kappa Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Sigma Nu Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Tau Gamma Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**

Theta Alpha Zeta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Chi Lambda					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Delta Upsilon					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Epsilon					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Epsilon Nu					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Eta Kappa					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Omega Lambda					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**

Omicron Alpha					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Omicron Beta					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Omicron Mu					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Omicron Tau					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Gamma Upsilon					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Rho Xi					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Theta Kappa					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**

Zeta Iota					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**
Zeta Kappa					
Last Name	**First Name**	**Status**	**ID #**	**Life Member #**	**Date Received**

New York State Monies Collected during FY YYYY-YYYY

Zeta Phi Beta Sorority, Inc.

Event	Soror/Chapter	Check/MO#	Received	Amount	Receipt #	Comments

This Page TOTAL: 0.00

Zeta Phi Beta Sorority, Inc

Monies Collected At-A-Glance

Month	Chapter Tax	Per Capita Tax	Operational Tax	Scholarship Fee	Event Payments	TOTAL
September						$0.00
October						$0.00
November						$0.00
December						$0.00
January						$0.00
February						$0.00
March						$0.00
April						$0.00
May						$0.00
June						$0.00
TOTAL						$0.00

Proposed Constitution and By Laws Amendment Form

Zeta Phi Beta Sorority, Inc., New York State
Proposed Constitution and By Laws Amendment Form

Name: _____ Email: _____

Chapter: _____ Basileus email: _____

Revision/Addition/Deletion to: (Check one) Constitution ____ By Laws ____

Article: _____Section: _____ Article Name: _____

The current language reads:

(Do Not Write Below – For Official Voting Purposes Only)

Motion:

_____

_____

Seconded: _____ **Vote: For** _____ **Against** _____ **Abstentions** _____

CHAPTER FINANCIAL REPORTING FORM

Zeta Phi Beta Sorority Inc.
New York State
2012-2013
CHAPTER FINANCIAL REPORTING FORM

- **Complete the attached form when submitting State per capita assessments.**
- **TYPE or neatly PRINT all requested information.**
- **Include ALL requested information. Leave no fields blank!**
- **Submit Original and TWO copies of the form with payment.**

Chapter Name:		Date:
Mailing Address:		
City:	State:	**Zip:**
College/University:		**Reporting Year:**
Submitted By:		Title:
Return Address: (If different from above)		
City:	State:	Zip:
E-mail Address:		Phone #:
Sponsoring Graduate Chapter:		

☐ Initial Report ☐ Supplemental Report

Undergraduate Description	No.	Dollar Amount	Graduate Description	No.	Dollar Amount
Undergraduate Chapter Tax $75 per chapter		$	Graduate Chapter Tax $125 per chapter		$
Undergraduate Operational Tax $50 per chapter		$	Graduate Operational Tax $160 per chapter		$
Undergraduate Per Capita Tax $5 per member		$	Graduate Per Capita $10 per member		$
Undergraduate Scholarship $50 per chapter (Each Year)			Graduate Scholarship $100 per chapter (Each Year)		
Membership Intake (All State Intake Assessments are to be mailed immediately after receiving approval from National 1st Anti-Basileus) $5 Per Capita (Undergraduate) $10 Per Capita (Graduate)					$
The State Tamias-Grammateus must receive chapter Tax/Initial State Assessments by October 31st of every year or a $15 Late Fee will be assessed per chapter.					
Late Fee $15 per chapter	$		**Reclaimed: $5 per member (Undergraduate) OR - $10 per member (Graduate)**		$
Other:			**Dollar Amount:**		$
GRAND TOTAL =					$

Chapter Tax/State Assessments must be RECEIVED BY OCTOBER 31st of every year or a $15.00 late fee per chapter will be assessed. Only Submit: CERTIFIED CHECK, CHAPTER CHECK, CASHIER'S CHECK OR MONEY ORDER Payable to Zeta Phi Beta Sorority, Inc. – New York State and REGULAR Mail to: Soror Ebony McLean, 20 Baughman Pl, #1E, Brooklyn, New York 11234

DO NOT WRITE BELOW THIS LINE

Date Received: _____ Receipt No: Check/MO#

Return Receipt Mailed: _____

Tamias-Grammateus: _____

NOTE: Return the Original and Two copies to the State Tamias-Grammateus

Submit this form each year & when you reclaim & initiate new members!

ZETA PHI BETA SORORITY, INCORPORATED
NEW YORK STATE
YYYY-YYYY

Chapter Name:

STATUS KEY: G (Graduate) **UG** (Undergraduate) **AM** (Associate Member) **T** (Transfer) **R** (Reclaim) **LM** (Life Member) **NM** (New Member)

	NAME (first & last)	ID #	STATUS
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

	NAME (first & last)	ID #	STATUS
21			
22			
23			
24			
25			
26			
27			
28			
29			
30			
31			
32			
33			
34			
35			
36			
37			
38			
39			
40			

DO NOT WRITE BELOW THIS LINE

RECEIVED BY _____ **DATE RECEIVED** _____ **RECEIPT #** _____

Request for Budget Increase

Date: _____

Officer Name _____

Position _____

Address _____

City, State Zip _____

Phone Number _____

Email _____

Line Item : _____

Amount Requested: _____

Project/ Initiative: _____

Rationale:

*Note: Be sure to submit any documentation to help support your request.

Signature: _____

For Internal Use Only			
Date Received:			
Approved:	Yes	No	
Funds moved from:			
Comments:			
State Director Signature			**Date:**

Expense Reimbursement Voucher Form

Date: _____

Officer Name _____

Position _____

Address _____

City, State Zip _____

Phone Number _____

Email _____

Transaction Date	Line Item	Description of Expense	Payment Type	Amount
				0.00
				0.00
				0.00
				0.00
				0.00

*Note: All requests must be accompanied by an original receipt. Provide a detailed description of the expense.

For Internal Use Only			
Date Received:			
Approved:	Yes	No	
Check #		**Line Item Balance**	
Comments:			
State Director Signature			**Date:**

Zeta Phi Beta Sorority, Incorporated New York State

Balance Sheet

(Insert time frame)

Beginning Balance

Income

Chapter Assessments *(Include Year)*	$ -	
NYS Executive Board Meeting *(Include Year)*	$ -	
Founders Day *(Include Year)*	$ -	
Scholarship Account	$ -	
Total Income		**$ -**

Expenses

Gifts	$ -	
Lodging	$ -	
Meals	$ -	
Office Supplies	$ -	
Postage	$ -	
Printing	$ -	
Telephone	$ -	
Travel	$ -	
Tamias	$ -	
NYS Executive Board Meeting	$ -	
Founders Day	$ -	
Bank Service Fees	$ -	
Storage	$ -	
Website	$ -	
Total Expenses		**$ -**

Ending Balance **$ -**

(Street Address)
(City, State Zip Code)

FISCAL SPONSORSHIP APPLICATION
AND GUIDELINES

Zeta Phi Beta Sorority, Inc. - New York State offers fiscal sponsorship and project management services to chapters and organizations that do not have 501 (c)(3) non-profit tax-exempt status. Tax-exempt status is required by many foundations, corporations and government agencies in order to be eligible for funding and for exemption of federal, state and local taxes for purchases. As a fiscal sponsor, NYS - Zeta Phi Beta acts as an umbrella organization for an individual, chapter, organization or project and accepts and administers funds on its behalf. NYS - Zeta Phi Beta is legally responsible for the funds or tax exemptions received on behalf of fiscally sponsored projects and activities and insures that the funds are used for charitable purposes, and that donor reporting requirements are met and in a timely fashion.

ELIGIBILITY AND CONSIDERATIONS

In order to be eligible to apply for Fiscal Sponsorship, you must meet the following criteria:

- Reflect a similar commitment to the goals set forth in NYS - Zeta Phi Beta's mission.
- The work supported must be for purposes which are legal, further a legitimate tax exempt purpose, and in no way jeopardize the tax status of NYS - Zeta Phi Beta.

FISCAL SPONSORSHIP FEE

The fiscal sponsorship fee is determined on a sliding scale based on the overall grant/project budget, level of effort and services required, and whether project administrator must be hired by NYS - Zeta Phi Beta. The fee for use of NYS - Zeta Phi Beta's tax status for exemption of federal, state and local taxes in the furtherance of providing charitable services is the following:

- New York State Chapter/Auxiliary: $150 (Annual)
- New York State Chapter/Auxiliary: $75 (One-time use)
- Zeta Phi Beta Chapter/Auxiliary (outside of NYS): $250 (Annual)

- Zeta Phi Beta Chapter/Auxiliary (outside of NYS): $150 (One-time use)
- Organization/Individual: $200 (One-time use)

FISCAL SPONSORSHIP APPLICATION

Project/Purpose:

_____

Primary Contact:

_____

Role in Project: □ Administrator □ Other:_____

Name of Chapter/Auxiliary/Organization (If applicable)

_____

Address

_____

City State Zip Code

_____

Telephone Fax

_____

Email

Summary Description of Project/Use of Exemption

Anticipated Length of Project/Use of Exemption

_____

Will there be any 501(c)(3) allowed lobbying activity? Yes/No
If Yes, please
explain_____

***Imperative**: If your project will be engaging in 501(c)(3) allowed lobbying activities, NYS - Zeta Phi Beta must be informed and give consent prior to approving this application.*

Will there be any 501(c)(4) activity? Yes/No

If Yes, please
explain_____

Total Project Budget $ _____
Amount Raised to Date $ _____
Do you plan to fundraise? _____Yes _____No

Do you plan to sell any merchandise related to the project? _____Yes _____No

---

- Have you been fiscally sponsored before by NYS - Zeta Phi Beta? □ yes □ no
  If yes, for what project and year?

How did you hear about our fiscal sponsorship program, please choose:

□ NYS - Zeta Phi Beta □ Referral from Organization

□ Referral from a Colleague □ Other: _____

Zeta Phi Beta Sorority, Inc.
New York State
(Insert Full Address)

Project Proposal Submission Form

Submitted By:	{Name and Position}

PROJECTS DETAILS

Initiative	{Recommended event and important details}
Requested Budget	{Totals Only}
Anticipated Profit	{List anticipated profit, if any}
State Responsibility	{What is expected of the state members}
Goals and Expectations	{Why should this event occur?}

Initiative	
Requested Budget	
Anticipated Profit	
State Responsibility	
Goals and Expectations	

Signature		**Date**	

Submit to the State Director. Retain a copy for your files.

For Internal Use Only		
Date Received:		
Approved:	Yes	No
Comments:		
State Director Signature		**Date:**

YYYY New York State Leadership Conference

Motion to the Body of Zeta Phi Beta Sorority, New York State

Madame Chair,
I move: _____

Motion made by: _____ Chapter Name: _____

Seconded by: _____ Chapter Name: _____

Please provide rationale for this motion: _____

Shaded area to be filled out by the New York State Grammateus

I have recorded the above MOTION and noted the following action taken:

_____PASSES ___ UNANIMOUSLY ____ AYE ___ NAY

_____FAILED TO PASS

_____TABLED

_____WITHDRAWN _____DIED DUE TO LACK OF SECOND

ON THIS _____ DAY OF _____, _____.

Signed: _____

New York State Grammateus

Chapter Checklist Guidelines to prepare for and Internal Audit

1. Do the Bylaws accurately describe its current process?
2. Do you retain copies of IRS Forms 990?
3. Are permanent minutes maintained accurately?
4. Do the minutes accurately reflect actions taken at the meetings?
5. Do the minutes include the time, date and location of the meeting as well as the fact that proper notice was given or waived?"
6. Financial document prepared monthly?
7. Are member lists maintained showing status (i.e. Reclaimed, Transferred etc)
8. Are funds maintained in separate bank accounts?
9. Are all disbursements paid by check except for minor expenditures paid through the petty cash fund?
10. Is written documentation available to support all disbursements?
11. Are there any checks that have been outstanding over three months?
12. Is there a schedule of unpaid invoices including vendor name, invoice date, and due date?
13. Are contracts maintained?
14. How are your scholarships distributed? (I.E. To the school or directly to individual)

Monthly Update to State Director

To: Soror *insert State Director's name here*, NYS Director

From: Soror *insert YOUR name here*
NYS Tamias Grammateus

Re: Monthly Assessment Report for the Month of *insert month here*

This report covers all monies collected from *insert beginning date – insert ending date*. Any monies received after *insert date here* will be reflected in the next month's report.

Below is a synopsis of my attached spreadsheet:

Assessment Fees collected

- Graduate - $
- Undergraduate - $

TOTAL - $

Event Fees collected

- Executive Board meeting - $
- Founders' Day - $
- State Meeting - $

TOTAL - $

As of this report, all monies listed have been sent to the Tamias for deposit.

Zeta Phi Beta Sorority, Inc
New York State

(Chapter Name)

Chapter Report

(Insert Name)
International Grand Basileus

(Insert Name)
16th Atlantic Region Director

(Insert Name)
New York State Director

(Basileus Name)
Basileus
YYYY-YYYY

GRADUATE CHAPTER OFFICER CONTACT FORM

Chapter Contact Information:
Chapter Name:
Address:
City, State Zip Code:
Chapter Tax ID Number:

Name of Chapter Officer	Address/City/State/Zip	Telephone	Email Address
Basileus			
1st Anti-Basileus			
2nd Anti-Basileus			
3rd Anti-Basileus			
Grammateus			
Tamias-Grammateus			
Tamias			
Undergraduate Advisor(s)			
Youth Advisor(s) **Pearlette:** **Amicette:** **Archonette:**			
Amicae Advisor			
Amicae President			
Stork's Nest Coordinator			
Z-HOPE Coordinator			
Eldercare Coordinator			
Social Action Coordinator			
Founders' Day Coord.:			
Webmistress			

Graduate Chapter Membership Report
(Indicate Number)

Financial Members	☐	Golden Life Members	☐
New Members	☐	Life Members	☐
Transferred Members	☐	Associate Members	☐
Reclaimed Members	☐	**TOTAL MEMBERS**	☐

Out of the total members reported, how many are newly initiated within this membership year?

☐

Membership Recruitment/Reclamation Activities

1. Please describe membership recruitment and/or reclamation activities conducted this membership year?_____

_____

_____

2. How were the planned activities successful or unsuccessful?

_____

_____

_____

_____

3. What changes (if any) would you make to these activities?

_____

_____

_____

UNDERGRADUATE CHAPTER OFFICER CONTACT FORM

Chapter Contact Information:
Chapter Name:
School Name(s):
Chapter Mailing Address:
City, State Zip Code:

Name of Chapter Officer	Address/City/State/Zip	Telephone	Email Address
Basileus			
1st Anti-Basileus			
2nd Anti-Basileus			
Grammateus			
Tamias-Grammateus			
Tamias			
Membership Chair			
Z-HOPE Coordinator			
Eldercare Coordinator			
Social Action Coordinator			
Webmistress			
Other Officers: **1.** **2.** **3.**			

Campus Advisor: _____

Address: _____

_____

Telephone # _____

E-mail: _____

Undergraduate Chapter Membership Report
(Indicate Number)

Financial Members ☐

New Members ☐

Transferred Members ☐

Reclaimed Members ☐

TOTAL MEMBERS ☐

1. Out of the total members reported, how many are newly initiated within this membership year? ☐

2. If the undergraduate chapter is a "Metro" chapter, Please complete the following:

Name of School(s) Covered By Metro Charter	Address/City/State/Zip	Total # of Current Members On This Campus	Total # Newly Initiated Members In This Membership Year

Finer Womanhood Observance Report

Coordinator Name:
Coordinator's E-mail: _____

Date(s) of Finer Womanhood Activity/Activities: _____

Location of Activity/Activities: _____

_____

Type of Activity/Activities held: _____

_____

Number of persons participating: _____

Special guest(s), dignitaries, visiting sorors etc. in attendance: _____

_____

Scholarships and/or Awards presented: _____

_____

Additional Comments: _____

_____

Life Member Report

Chapter LM Coordinator: _____
Coordinator's E-mail: _____

Does your chapter currently have any Life Members? Yes _____ No _____

If yes, please provide the name, Life Member classification and contact information for each Soror in your chapter below. If additional space is needed, you may attach a printed list with the requested information.

Life Member Name	Address/City/State/Zip	Telephone/Email	LM Classification (i.e. Regular, Golden, Diamond)

Do you have any members that may be interested in becoming a life member?
If so, provide the names, addresses and telephone numbers of the Sorors.

_____
_____

Do Life Members participate in or perform any activities other than regular chapter activities? If so, please describe.

_____
_____

Necrology Report

Coordinator's Name:
Coordinator's E-mail: _____

Please list all deceased Sorors, Amicae or Youth. Please distinguish by placing the appropriate title in front of their name.

Name of Deceased	Date of Death
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Did your chapter contact the Necrology Coordinator at the time of each passing?_____

Did your chapter contact the State Director at the time of each passing? _____

Did your chapter prepare a resolution for the family?_____ If yes, please attach a copy of the resolution to this report.

Stork's Nest Report
Coordinator's Name
Coordinator's E-mail: _____

Does your chapter have an active Stork's Nest? _____

List the location(s) covered by your Nest: _____

_____

_____

Please complete the following information about your Stork's Nest activities this membership year.

Date(s) of Stork's Nest Classes	Location of Classes (Address/City/State/Zip)	# of Participants

If your chapter is interested in hosting a Stork's Nest program, please indicate below and provide the name and contact information of your chapter's coordinator.

_____

_____

ZHOPE Report
Coordinator's Name:
Coordinator's E-mail: _____

Please complete the following information on Z-HOPE activities for your chapter, amicae and youth auxiliaries for this membership year.

Chapter/Auxiliary	Total Z-Hope Programs	Total Attendance	Total Zeta Attendance	Total Cost of Activity	Total Donated Goods	Total Donated Money	Total Hours	Chapter/ Auxiliary Size	Total Z-HOPE Points Earned
Chapter									
Amicae									
Youth: Pearlettes									
Youth: Amicettes									
Youth: Archonettes									
State Z-HOPE Initiatives									
Region Z-HOPE Initiatives									
National Z-HOPE Initiatives									

Chapter Operating Standards
Self-Assessment
The purpose of this self-assessment is to identify and promote growth amongst the chapters in the state. Also to showcase a chapter's ability to develop and implement programming. The categories are as follows:

Scholarship and Academic Achievement
Program Implementation
Partnerships
Membership Growth and Retention
Chapter Operations
Risk Management

Areas of Focus	Total Possible Points	Your Chapter Points
Scholarship and Academic Achievement	100	
Program Implementation	250	
Partnerships	75	
Membership Growth and Retention	100	
Chapter Operations	325	
Risk Management	100	
Total	875 + Bonus Pts.	

Scholarship and Academic Achievement

Undergraduate Chapters

		Points	Chapter Score
The Chapter has a written Academic Policy		15	_____
The Chapter Cumulative GPA is above 3.0		25	_____
The Chapter MIP Candidates Cumulative GPA is above 2.7		25	_____
Compared to other sororities on campus, the Chapter has the highest GPA		25	_____
Is at least in the top percentile	10		_____
Total Possible Points		**100**	_____
Bonus Points: Score 3 points for each member who has achieved a 3.0 GPA or higher		3 pts.	_____

Graduate Chapters

	Points	Chapter Score
Chapter hosts embellishment opportunities, special presentations, and/or leadership training during the chapter's general meeting	25	_____
Chapter has implemented National "Adopt-A-School" Initiative Name and Address of Adopt-A-School: _____ _____	25	_____
Chapter has an established Scholarship Fund that provides scholarships annually.	25	_____
25% of chapter members have achieved or are studying towards a graduate level degree or above.	25	_____
Total Possible Points	**100**	_____
Bonus Points: Score 10 points for each undergraduate chapter the Graduate Chapter sponsors/advises whose cumulative GPA is above 3.0.	10	_____

Program Implementation

	Points	Chapter Score
Chapter has implemented at least one (1) activity under the National Signature Program, *Finer Women Don't Haze*	25	_____
Chapter has implemented at least one (1) Z-Hope Initiative	25	_____
Based on Chapter size, the Chapter raised/contributed the minimum amount to March For Babies	25	_____
Chapter has implemented at least one (1) Social Action activity	25	_____
Chapter participated in the State's Founders' Day program	25	_____
Chapter held at least one (1) Finer Womanhood program	25	_____
Chapter has an active Zeta Amicae Auxiliary	25	_____
Chapter has an established Stork's Nest	25	_____
Chapters has at least one (1) youth auxiliary group	25	_____
Chapter has logged over 1,000 community service hours	25	_____
Total Possible Points	**250**	_____
Bonus Points: Score 5 additional points for each additional Z-HOPE Program implemented	5 ea.	_____

Partnerships

	Points	Chapter Score
Chapter has partnered and/or co-sponsored events with other Zeta chapters	25	_____
Please list partnering chapters:_____ _____		
Chapter has partnered and/or co-sponsored events with Phi Beta Sigma Chapters	25	_____
Please list partnering Phi Beta Sigma Chapters: _____ _____		
Chapter has partnered and/or co-sponsored events with other Greek/non-Greek Organizations	25	_____

Please list partnering Greek/non-Greek Organizations:

_____

_____

Total Possible Points	**75**	_____

Membership Growth and Retention

	Points	Chapter Score
The Chapter has 100% retention of members.	25	_____
The Chapter has 10% growth in membership from last year	25	_____
The Chapter has reclaimed at least 2 Sorors this year	25	_____
The Chapter conducted MIP this year	25	_____
Total Possible Points	**100**	_____

Chapter Operations

	Points	Chapter Score
The Chapter has a written operating/programming budget	25	_____
The Chapter filed the Form 990 for the 2011-2012 sorority year	25	_____
The Chapter		
Has a written Constitution and Bylaws	25	_____
Has a written Standard Operating Procedures Manual		
Disseminates sorority communications to members regularly	25	_____
Has sisterly activities on regular basis	25	_____
Bank account is operating with chapter's tax ID number	25	_____
Chapter finances are reconciled monthly	25	_____
Chapter assessments were sent by October 31st deadline	25	_____
Chapter is a financial member and participates with local NPHC	25	_____
Chapter has a subsidiary/partnering 501(c)(3) tax exempt organization	25	_____

	Points	Chapter Score
Chapter and/or subsidiary/partnering 501 (c)(3) organization has been granted a grant from a local, state, or national grant making foundation or organization	25	_____

Grant making Organization Grant Amount Awarded

_____ _____
_____ _____
_____ _____

Chapter has at least 20% of its membership registered for the 2013 State Leadership Conference	25	_____
Chapter has at least 20% of its membership registered for the 2013 Atlantic Regional Conference	25	_____
Total Possible Points	**325**	_____

Risk Management

	Points	Chapter Score
All Chapter members are MIP certified.	25	_____
Chapter submitted annual Chapter MIP forms	25	_____
Undergraduate Advisor participates in MIP for undergraduate chapter	25	_____
Chapter acquires liability insurance for all events	25	_____
Total Possible Points	**100**	_____

ZETA PHI BETA SORORITY, INC

NYS CHAPTER YOUTH INVENTORY

START OF THE SORORITY YEAR _____

CHAPTER NAME:
YOUTH COORDINATOR NAME:
Youth Advisor Names:

PEARLETTE:	
AMICETTE:	
ARCHONETTE:	

MEMBERSHIP INFORMATION

Youth Groups: (please check Yes or No to verify if you have an active youth group(s)).

			YOUTH			# VOLUNTEERS	
	YES	NO	# of members	DUES/ MTG	# ADVISORS	MALES	FEMALES
Pearlettes							
Amicettes							
Archonettes							
➢ Graduating Seniors*							

***On a separate sheet, please list the Names and Address of your Graduating Archonette Seniors.**

If you do not have an active youth group are you interested in starting up one? Yes ___ No___

If the answer is yes, will it be in the current fiscal year?

Will you need assistance in starting the youth group? Yes___ No___

ZETA PHI BETA SORORITY, INC.

END-OF-YEAR YOUTH SURVEY

SORORITY YEAR _____

CHAPTER NAME:

YOUTH COORDINATOR NAME:

Youth Advisor Names:

PEARLETTE:	
AMICETTE:	
ARCHONETTE:	

PROJECTS/ACTIVITIES: (List of activities performed during the year – Please denote all Z-HOPE activities with an (x) to the right; attach additional sheets if needed.)

COMMUNITY INVOLVEMENT		EDUCATIONAL (Academic)		FUNDRAISING		SOCIAL	

YOUTH GROUP GRADUATING SENIORS/SCHOLARSHIP AWARDS

(Please list the names, addresses, and the college/universities all chapter Archonette seniors have been accepted to, along with the amount of the individual scholarships awarded to your graduating Archonettes by your chapter.

NAME	Permanent Address	Chapter Scholarship		University Attending	Other Contact Info, i.e. campus
		Check (x) if Recipient	Amount ($)		

ZETA PHI BETA SORORITY, INCORPORATED
NEW YORK STATE AMICAE AUXILIARIES

AMICAE SERVICE DELIVERY REPORTING FORM

AMICAE Auxiliary NAME: _____ **SORORITY YEAR**: _____

AMICAE ZETA SERVICE CHAPTER: _____

PROJECTS/ACTIVITIES: (List of activities performed during the year – Please denote all Z-HOPE activities with an (x) to the right; attach additional sheets if needed.)

EVENT	HOSTING ORGANIZATION Check One: Zeta	Amica	# PERSONNEL Zeta	Amica	TYPE of SUPPORT (I.e., planed the event or just attended)	# Amicae Support Hours
COMMUNITY INVOLVEMENT:						
EDUCATIONAL (Academic):						
FUNDRAISING:						
SOCIAL:						
TOTAL SUPPORT PERSONNEL:					**TOTAL SUPPORT HOURS:**	

Completed by: **DATE**:

Title:

END