

ATLANTIC REGION



STANDARD OPERATING PROCEDURES MANUAL

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Introduction

Zeta Phi Beta Sorority, Incorporated – Atlantic Region has embarked on standardizing our operations. In the following pages you will find the what, how, when, why and who for our elected and appointed positions. This document will serve as a framework and/or a “how-to” manual to provide consistent direction and structure to our regional officers and their processes. As developed in 2014 through 2016, this is the culmination of best practices adopted over the decades of the Sorors that have been working hard for Zeta in our amazing region. The level of detail is necessary to provide guidance, understanding and expectation for the officer and the non-officer so that we are all on one accord when we volunteer to serve in and to support those in leadership positions.

Sorors, we now have the foundation for the job descriptions, procedures and the accountability for performance. With that foundation comes alignment, reduction of redundancy and a clearer vision as to how all of our moving parts work together in the best interest of our Sisterhood. The Atlantic Region is poised to not only implement the National Programmatic Thrusts; the Goals of the International Grand Basileus; the strategies of the Atlantic Region to achieve and excel at all national and international goals; the objectives of the region; the ability to properly support the states and chapters that comprise this astounding region; but also to facilitate effective transition at the appropriate time.

As mentioned, this journey began long ago and credit must be given to all those that have served as officers throughout the history of the Awesome Atlantic Region. But specifically the effort of the 11th Atlantic Regional Director, Valerie Hollingsworth-Baker, must be acknowledged and applauded. During her administration, Regional Director Hollingsworth-Baker developed and implemented a Standard Operating Procedure for the Atlantic Region. Over time that document was lost. As our National Director of Strategic Planning, Soror Hollingsworth-Baker worked with each state in our region to develop its own Standard Operating Procedure Manual and then graciously worked with Soror Charlotte Mauldin Weston, Atlantic Region SOP Coordinator, to create this document. All of our States and now the Atlantic Region have the tools necessary for consistent and uniform excellence. Thank you to Soror Hollingsworth-Baker and Soror Weston for providing us with the direction, reassurance and guidance necessary to operate with the highest quality of volunteer and professional service. Leadership truly does live here!

Janet Y. Bivins, Esq.
Atlantic Regional Director
Zeta Phi Beta Sorority, Incorporated

Overview

The goal of the Standard Operating Procedures Coordinator was to develop a **Standard Operating Procedures (SOP) Manual** for the Atlantic Region. This SOP provides for the development and implementation of policies, procedures and processes that improve upon the current practices of the Region. The Bylaws of the Atlantic Region may be described as the “bones” of our regional organization, this SOP is the actual “meat” or “flesh” added to these Bylaws or “bones” The SOP provides the detail as to how we do business.

The SOP manual includes a table of contents and an appendix of forms. All elected and appointed officers are listed and described with their respective knowledge/skill sets, duties and responsibilities. There is a Transition Plan for officers. Procedures for conference planning, protocol, record retention, marketing and branding, website/email and social media are some of the many policies and procedures described. There are also detailed policies and procedures for transaction business by our Regional Financial Officers.

Hopefully, this Regional Manual will inspire sorors at the local chapter and state levels to create their own SOP's.

Sincere appreciation is extended to the following Sorors who worked tirelessly in collaboration with this coordinator throughout the preparation of this Atlantic Region Standard of Operations Procedures Manual:

Soror Valerie Hollingsworth-Baker, National First Anti-Basileus and former National Director of Strategic Planning;

Soror Barbara Cousar – PA State Director;

Soror Martha Sims-Wilson – DE State Director;

Atlantic Region Elected Officers;

Atlantic Region Appointed Coordinators;

Sorors Kelley Mauldin and Sarah F. Bivins for set-up and editing assistance;

And to Janet Y. Bivins, Esq., Atlantic Regional Director, for appointing me to this position. It is great working with you...again.

Charlotte Mauldin Weston
Standard Operating Procedures Coordinator
Atlantic Region
Zeta Phi Beta Sorority, Incorporated

Atlantic Regional Director Duties and Responsibilities

Per our National Constitution and Bylaws, the Regional Director is appointed by the International Grand Basileus and represents the Region on the National Executive Board. In addition, per the Atlantic Region Bylaws, the Atlantic Regional Director is the Chairman of the Atlantic Region Executive Board.

Atlantic Regional Director

Skills/Knowledge/Qualifications:

- As Outlined in the National Constitution and Bylaws of Zeta Phi Beta Sorority, Incorporated

Major Responsibilities and Duties:

- The Regional Director is the official representative of the Atlantic Region in which she oversees.
- She is a member of the Regional Executive Board.
- She reports directly to the Grand Basileus but is also accountable to the members of the Atlantic Region.
- She shall develop strategies for the Region based on National goals and programmatic initiatives.
- She shall develop goals, objectives and strategies for Atlantic Region initiatives.
- She shall have the power to make appointments for key personnel in order to carry out the business of the Region.
- She shall also have the power to remove key personnel she has appointed if they are unable to carry out their responsibilities.
- She shall work with and direct the regional officers—both elected and appointed to meet the National goals.
- She shall work with and direct the regional officers—both elected and appointed to achieve the Region's goals.
- She shall work with and advise the State Directors and state officers to assist in meeting the State's goals.
- She shall contract for, plan, implement and execute all Regional Executive Board Meetings and Leadership Conferences with the Regional Meeting Planner and through the appointment of a Marshal and support/host chapter.
- She shall disseminate key dates of meetings and region events to the membership of her Region.
- She shall attend all state leadership conferences within her region.
- She shall travel within her region when necessary for various reasons – (i.e. Chapter events, State events, investigations, etc.).
- She shall be responsible for dissemination and reinforcement of all National policy changes to her membership.

- She shall be responsible for keeping the International Grand Basileus informed of all activities within her Region.
- She shall be responsible for keeping the lines of communication open between her Region and the National leadership.
- She shall preside over the Regional Executive Board meetings and the Regional Leadership Conferences.
- She shall prepare a year-end report for dissemination for presentation at the Atlantic Regional Leadership Conference.
- She shall be responsible to prepare a regional report to be submitted to the Grand Basileus in order to be presented at the Boulé.
- She shall be responsible for all reporting requested or assigned by the International Grand Basileus.
- She shall review and approve prior to submission all reports submitted to National officers and directors on behalf of the Atlantic Region.
- With the approval of the International Grand Basileus, she may be called upon to represent the International Grand Basileus in her absence at meetings/events where a representative is requested.
- The Regional Director is required to attend the Regional leadership conferences as well as the Boulés.
- She will be assigned duties to carry out at the request of the Grand Basileus at the Regional Leadership Conferences and Boulés.
- She shall sign all Region documents, approve all regional payments and authorize travel and office expenses for all Regional Officers.
- She shall be trained on the MIP process and is the official MIP trainer for her Region.
- She shall preside over chapter and participate in auxiliary chartering ceremonies in her Region in accordance with the National Handbook.
- The Regional Director has the authority and obligation to request a cease and desist from the International Grand Basileus/national headquarters of a soror or a chapter prior to the commencement of an investigation regarding a violation of the rules and regulations of the sorority.
- She shall be responsible for the dissemination of all National communications to the State Directors for communication to the chapters and auxiliaries.
- She must pre-approve all initiatives performed in the name of or on behalf of the Atlantic Region.
- She must review and determine if she will recommend all charter applications for submission to the International Grand Basileus within the Atlantic Region.
- The Standard Operating Procedures of the Regional Directors is incorporated by reference.

Elected Officers Duties and Responsibilities

Officers are elected every two (2) years during the Biennial Conference. An officer must be elected by the majority of votes cast for that office. The election shall be by secret ballot. Elected Officers will report directly to the Regional Director and the Regional Body.

Grammateus

Special Knowledge/Skills:

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

Major Responsibilities and Duties:

- Shall be bonded within thirty (30-90) days after taking office.
- Shall serve as the recorder of the proceedings for the Atlantic Region
- Shall take minutes at each Executive Board meeting.
- Shall take minutes at each Leadership Conference.
- Shall take minutes at each Executive Committee Meeting.
- Shall send copies of the Executive Board meeting minutes to each member of the Board ninety (90) days after the close of the board meeting.
- Shall send copies of the Leadership Conference proceedings to all chapters within ninety (90) days following the close of the Regional conference.
- Shall be responsible for cataloging and filing minutes.
- Shall perform such duties as registration and roll call at Atlantic Regional Leadership Conferences.
- Shall sign and authorize reimbursement expenses of the Regional Director.
- She shall maintain minutes from past administrations (10 years) for reference.

What the Minutes Should Contain

- Kind of meeting: regular, special, or annual.
- Name of the Assembly.
- Date of the meeting and the place.
- Time meeting was called to order.
- Presence of the chairperson and Grammateus or in their absence, names of person(s) who substituted.
- Minutes of which the last meeting were approved or dispensed.

Note: Approving minutes is usually done by general consent as follows: The chair: “*Are there any corrections to the minutes?*” If there are none, the chair says, “*hearing none, the minutes stand approved as distributed*”, or “*read*”. If corrections are made, “*The minutes stand approved as corrected*”.

Using a separate paragraph for each, the following should be recorded:

- All motions (except withdrawn motions), points of order and appeals, whether sustained or lost. Use the wording in the form in which the motion(s) were made and **adopted**.
- The number of persons voting on each side and the number of persons who abstained when taking a roll call or division of the house vote.
- Report of elections. Include report of all votes cast as shown by the Elections Committee’s report, unless the assembly votes to do otherwise.
- The hour of adjournment.
- Do not use “**Respectfully submitted**” – it’s out-of-date.

Important Notes:

- The minutes should not contain the names of seconders of motions, the Grammateus’ opinion on matters, any withdrawn motions, or a summary of the remarks of a guest speaker.
- The Grammateus should sign minutes after the assembly adopts them.
- Minutes are not official until adopted by the assembly.
- After the Grammateus’ minutes have been adopted, only a motion to amend an adopted motion may change them.
- The Grammateus should sign published minutes.
- A “**Special**” meeting should not approve the minutes of the previous Regional Conference.

Anti-Grammateus

Special Knowledge/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 the Region in the absence of the Grammateus.
- Shall take minutes at any Executive Board meeting in the absence of the Grammateus.
- Shall take minutes at any Leadership Conference in the absence of the Grammateus.
- Shall receive and catalog all correspondence.
- Shall read all incoming correspondence at the Executive Board meeting.
- Shall read all incoming correspondence at the Leadership Conference.
- Shall assist the Grammateus at Executive Board Meetings and Leadership Conferences.

Tamias

Special Knowledge/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 in financial accounting software.
- Proficient financial bookkeeping skills.

Major Responsibilities and Duties:

- Shall be bonded within three months (30-90 days) after taking office.
- Shall be the custodian of all monies received from the Tamias Grammateus of the Atlantic Region and should deposit the monies into the bank within 3-5 business days of receipt from Tamias Grammateus.
- Shall disburse monies on vouchers approved and countersigned by the Atlantic Regional Director. All vouchers must also receive approval of the Budget and Finance Coordinator. Cash flow should be verified prior to all disbursements.
- The Tamias, along with the Grammateus, shall countersign reimbursement vouchers submitted by the Atlantic Regional Director.
- Shall keep an accurate record of all financial transactions of Atlantic Region in the region's financial accounting software.
- The Tamias shall maintain adequate internal controls over the Region's assets and monitor the expenditures to ensure they are in accordance with each line item on the Region's budget.
- Shall be responsible for preparing the 990 forms for the Internal Revenue Service on a yearly basis.
- Shall be a member of the Executive Board.
- Shall be a member of the Budget and Finance Committee and work with the Atlantic Region Budget and Finance Coordinator to develop strategies to facilitate the funding of various Region programmatic endeavors.
- Shall follow established financial accounting and reporting procedures for the region and assist with the development of them.
- Shall assist in the development of budget, accounting, and 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 Atlantic Region business meetings and leadership conferences in accordance with reporting format determined by the Budget and Finance Coordinator.
- Shall prepare quarterly financial reports as of the last day of the month for review by the Regional Director and the rest of the Finance Team (Tamias Grammateus and Budget and Finance Coordinator).
- Shall assist with the development of processes to monitor fiscal audit compliance and ensures adherence to policies and internal controls.

Tamias Grammateus

Special Knowledge/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 in financial accounting software.
- Proficient financial bookkeeping skills.

Major Responsibilities and Duties:

- Shall be bonded within thirty (30-90) days after taking office.
- Shall be the officer to receive all monies (assessments, etc.) sent by the graduate and undergraduate chapters.
- Shall turn over all receipts to the Tamias within 3-5 business days.
- Shall keep an accurate record of all funds received by this office in the region's financial accounting software and provide receipts accordingly
- Shall produce monthly reports of the financial membership of the region based by state, chapter and individuals to the Atlantic Regional Director.
- Shall produce bi-monthly reports of the financial chapters within the region to the Atlantic Regional Director for distribution to the National First Anti-Basileus
- Communicates regularly with chapters to confirm number of financial members
- Shall assist the Atlantic Region Tamias in preparing the 990 forms for the Internal Revenue Service on a yearly basis.
- Shall be a member of the Budget and Finance Committee and work with the Atlantic Region Budget and Finance Chair to develop strategies to facilitate the funding of various Region programmatic endeavors.
- Shall prepare and deliver financial report presentations at Executive Board Meetings and Leadership Conferences in accordance with reporting format determined by the Budget and Finance Coordinator.
- Shall prepare quarterly financial reports as of the last day of the month for review by the Atlantic Regional Director and the rest of the Finance Team (Tamias and Budget and Finance Chair).
- Shall assist with the development of processes to monitor fiscal audit compliance and ensures adherence to policies and internal controls.

Phylacter

Special Knowledge/Skills:

- Excellent oral and written communication, organizational and presentation skills.
- Proficient in the Bylaws of the Atlantic Region and the National level.
- Proficient in Robert's Rules of Order (Newly Revised).

Major Responsibilities and Duties:

- Shall be present at all meetings of the Atlantic Regional Executive Board Meetings and Leadership Conferences.
- Shall be a member of the Executive Board.
- Shall advise the Regional Director of the rules and regulations governing said body according to the Bylaws of Atlantic Region and Robert's Rules of Order (Newly revised) when called upon by the Regional Director.
- Shall serve as ex-officio for all meetings relative to the Bylaws.
- Shall be available for consultant services to the Atlantic Regional Director and Region and local officers in activities pertaining to Bylaw and policy matters
- Shall review all Atlantic Region Bylaws upon the request of the Atlantic Region Director to ensure the Bylaws are in line with the National Constitution and Bylaws.

Regional Representative to the National Nominating Committee

Special Knowledge/Skills:

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

Major Responsibilities and Duties:

- Shall represent the Atlantic Region on the National Nominating Committee.
- Shall attend Boulé.
- Shall assist in creating the National nominating procedures in accordance with the National Constitution.
- Shall organize the National Candidate's information and forum at the Atlantic Regional Leadership Conference.

Appointed Officers Duties and Responsibilities

The Regional Director is appointed by the Grand Basileus and she shall appoint coordinators for the Region that are deemed necessary to implement the National Programs of Zeta Phi Beta Sorority, Inc. Officers appointed by the Regional Director will report directly to the Regional Director.

Adopt a School 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
- Program development experience, including visionary with strategic planning ability
- Strong background in the field of education

Major Responsibilities and Duties:

- Serve as the Regional coordinator, and spokesperson for the Adopt-A-School Program
- Facilitate the development, implementation, and scheduling of Adopt –A-School Program reporting (funding/incentive items/# of participants) throughout the region
- Assist with programming needs and coordinate the acquisition of ancillary personnel with appropriate skills/abilities to meet the needs for Adopt-A-School Programs throughout the region
- Coordinate with the National Z-HOPE Director to extrapolate the Z-HOPE documentation on Adopt-A-School programs throughout the region in accordance with the national communication protocol.
- Create a year-end report to be submitted to the National Z-HOPE Chair in order for the information to be included in the overall National Z-HOPE report reflecting Adopt-A-School updates for the current fiscal year
- Compile ad hoc reports upon request for the Regional Director, National Programs Director and/or the National Z-HOPE Director

Amica Affairs Coordinator

Special Knowledge/Skills:

- Possess a positive attitude and the ability to secure information from appropriate sources.
- Understanding of the Zeta Amica Auxiliary, purpose, role and function as it pertains to the Sorority.
- Effective oral and written communication and presentation skills.
- Ability to plan, format and execute projects and duties in an accurate and timely manner.
- Project and team management skills.
- Demonstrated ability to work in a high-performing, quality-driven, team-based environment.

Major Responsibilities and Duties:

- Serve as the Region's representative, coordinator, and spokesperson for the Zeta Amica Auxiliaries Program.
- Articulate the Amica Auxiliary to Chapter Sponsors and provide guidance to the Zeta Amica Region President in carrying out her duties.
- Collaborate with the Amica Region President and the Regional Director to plan Amica workshops for the Atlantic Region Leadership Conference.
- Monitor the Region programming of Amica Auxiliaries.
- Ensure that the Amica Auxiliaries are up-to-date on all pertinent information needed to operate effectively.
- Ensure that Amicae are prepared for all Leadership Conferences when they are expected to register.
- Support Amica activities, programs, etc.
- Facilitate the development of Amica training workshops and materials.
- Develop strategic planning to facilitate the development of long-term planning of Amica programming.
- Work with Chapter Amica Coordinators to ensure they are assisting Amicae in carrying out Zeta's programs and Amicae are running their meetings in an effective manner.
- Plan workshops for Zetas in order to teach sorors how to work effectively with Amicae.
- Develop a Region wide direction for Amicae.
- Ensure all pertinent information from National is disseminated to all Amica Auxiliaries within the Region via the national communication protocol.
- Report to the Region at the direction of the Regional Director.

Awards Coordinator

Special Knowledge/Skills

- Effective oral/written communication and interpersonal skills
- Ability to work under pressure and within time constraints
- Exceptional organizational skills

Major Responsibilities and Duties:

- Serve as the regional coordinator for awards/special presentations.
- Work in conjunction with the Atlantic Regional Director to secure all awards to be presented at the Atlantic Regional Leadership Conferences (to include Z-HOPE awards, Regional Director awards, etc.)
- Ensure that all awards have been shipped and arrive at the Conference site.
- Ensure that all awards for any given program during the Atlantic Regional Conference are placed in the proper location, ready for presentation.
- Assist the program presenters with the presentation of all awards during the conference.

Budget and Finance Coordinator

Special Knowledge/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).
- Proficient in financial accounting software.
- Certified Public Accountant preferred

Major Responsibilities and Duties:

- Monitor the financial status of the Region.
- Develop the budget for the Regional Executive Board Meetings and Leadership Conferences.
- Obtain data from Regional Director, Elected & Appointed Officers to prepare a proposed budget and make adjustments and changes to the budget as needed,
- Shall lead the Finance Team to ensure adherence to policies and internal controls,
- Work with the Finance Team to ensure everyone understands the budgeted line items; track expenses to keep the Region solvent; assist in future budget development; and work closely with the Regional Director, Elected and Appointed Officers to stay within budget.
- Develop and oversee financial accounting and reporting procedures for the organization.
- Assist in the development of workshops and instructional materials regarding budgeting, accounting and finance training.
- Prepare and deliver financial presentations at Leadership Conferences, Executive Board Meetings and workshops, etc.
- Monitor the Region's budgets, projecting expenditures, identifying trends and potential issues, and developing recommendations for corrective action.
- Assist with drafting the Region's financial policies and procedures manual.
- Provide support to Region on budgetary matters.
- Coordinate the development of processes to monitor fiscal audit compliance.

Chaplain

Special Knowledge/Skills

- Excellent oral/written communication and interpersonal skills
- An ordained minister

Major Responsibilities and Duties:

- Serve as the Atlantic Region Chaplain.
- Strive to understand the needs and initiatives of the region so as to provide spiritual guidance in all we do.
- Oversee the preparations for the Regional Leadership Inspirational Breakfast, when applicable.
- Officiate at the Regional Leadership Inspirational Breakfast.
- Set the spiritual tone at the Regional Executive Board meetings as well as the Regional Leadership Conferences.
- Provide spiritual support for members of the region when required.

Chief of Staff

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
- Require a strong attention to detail and work effectively under tight deadlines
- 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
- Superior ability to develop materials for presentation to global audiences
- Ability to build positive relations with members, business professionals and corporate sponsors
- Proficiency with Microsoft Office software, including word processing, spreadsheet, presentation and database applications

Major Responsibilities and Duties:

- Serve as the Regional Director's Chief of Staff
- Shall be knowledgeable of all offices, officers and responsibilities of each in the Atlantic Region.
- Shall outline deadlines for reporting in conjunction with the Regional Director.
- Shall be copied on all relevant emails and reports to assist in recordkeeping and adherence to deadlines.
- Shall assist with the creation of the Regional Director's power point reports and presentations if necessary.
- Shall assist the Regional Director with the logistical organization of the Regional Leadership Conferences and Executive Board Meetings.

Choir Director

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
- Require a strong attention to detail and work effectively under tight deadlines
- 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
- Previous experience as a choir director
- Background in music and/or music education
- Be skilled at a musical instrument

Major Responsibilities and Duties:

- Serve as the Atlantic Region Choir Director.
- Choose the song selections for the Choir with the approval of and in conjunction with the Regional Director and theme and/or needs of the regional event.
- Indicate and then seek approval from the Regional Director and Meeting Planner for the logistical needs of the choir for rehearsal and performance during the conference or meeting.
- Send out all communication to her choir members.
- Schedule all choir rehearsals.
- Serve as the conductor for all choir performances.

Assistant Choir Director

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
- Require a strong attention to detail and work effectively under tight deadlines
- 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
- Musical background is a plus

Major Responsibilities and Duties:

- Serve as the Atlantic Region Assistant Choir Director
- Assist the Choir Director in choosing the song selections for the Choir
- Assist the Choir Director with sending out all communication to their choir members
- Assist the Choir Director is scheduling all choir rehearsals
- Serve as the conductor in the absence of the Choir Director for choir performances

Demographics Coordinator

Special Knowledge/Skills:

- Proficient in Microsoft applications (Excel, PowerPoint, Word and Access).
- Effective oral/written communication skills.
- Possess a positive attitude and the ability to secure information from appropriate sources.
- Strong interpersonal and organizational skills.
- Effective presentation skills.
- Highly creative, analytical, and tactical; having the ability to identify problems, conceptualize solutions, and problem-solve via formal process.
- Ability to work under pressure and within time constraints.
- Organizational skills; ability to follow-thru on a project from inception to completion.
- Knowledge and skills in data collection; surveys and reporting.
- Proficient in developing polls and summarizing information gathered

Major Responsibilities and Duties:

- At the direction of the Regional Director, develop a demographics survey for the Region that will also be available to sorors and Amicae that do not have access to the internet.
- Disseminate demographics survey and collect the data.
- 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 Region.
- 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 Region and regional initiatives.
- Assist in the development of procedures and practices to facilitate the standardization of data collection, storage, and retrieval of the Atlantic Region related data, including maintaining data and report repositories; improve the quality and flow of data across committee divisions as they relate to various auxiliary and Zeta membership and programmatic initiative's planning, operation, and growth.
- Develop a data bank repository to house all demographic information on the membership of the Atlantic Region.

Documenting Our Atlantic Region Success (DOARS) 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
- Program development experience, including visionary with strategic planning ability

Major Responsibilities and Duties:

- Develop and lead the Region's selection DOARS honorees selection process.
- Update the application form and the criteria and forward to the Regional Director for approval and dissemination.
- Acknowledge and review with the selection committee all applications submitted by members of the Region.
- Notify the recipients of the logistics for the ceremony.
- Notify all applicants of the determination.
- Design the acknowledgement of the honorees during the ARLC and upon approval of the Regional Director, execute the ceremony.
- Update the official Atlantic Region DOARS book with the approved submissions.

Elder Care 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, bring out the best in others, and arrive at consensus.
- Effective presentation skills.
- Program development experience, including visionary with strategic planning ability.

Major Responsibilities and Duties:

- Create a committee to assist and support Atlantic Region 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 in the Region who are dedicated to the care and welfare of the aging.
- Create a list serve for the Region Elder Care Coordinators.
- Create and maintain a contact list of key people and organizations working on different issues as they relate to elder care.
- Create and 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.
- Create an annual report and include photos and information from all region elder care programs, which shall be submitted to the Regional 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 Region.
- Collaborate with the Region 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.

Fundraising Coordinator

Special Knowledge/Skills:

- Strong oral and written communication and presentation skills.
- Experience in development and fundraising.
- Effective interpersonal skills with ability to work across various committees; ability to participate in small groups, to bring out the best in others, and to 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-through 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 and data collection instruments, data analysis, and data interpretation.
- Strong knowledge of procedures for conducting research to identify viable grantors and or funds.

Major Responsibilities and Duties:

- Organize and oversee the fundraising programs for the Atlantic Region.
- Identify and evaluate potential fundraising activities.
- Structure, organize and chair the fundraising committee.comprised of representatives from all states within the region.
- Set goals related to fundraising.
- Encourage chapter participation and support of the Region's fundraising projects, events, etc.
- Assist with the 501 © 3 process (be it through a paid consultant, etc.).
- Work with the finance team for the appropriate collection and disbursement vehicles for any fundraising efforts.

Graphic Designer

Special Knowledge/Skills

- Graphic design experience
- Experience working with modern graphic design software such as Adobe Illustrator, InDesign, or Canva
- Superior oral and written communication and presentation skills
- Ability to plan, format and execute projects and duties in an accurate and timely manner
- Creative and innovative.
- Project and team management skills.
- Possess a positive attitude and the ability to secure information from appropriate sources.
- Flexibility and availability on short notice.

Major Responsibilities and Duties:

- Collaborate with Regional Director in designing advertisements for external and internal communication (i.e. region meetings, leadership retreats, etc.)
- Provide technical services to chapters as it pertains to creating advertisements (flyers, save the date cards, etc.) for chapter events and or souvenir journal advertisements
- Develop advertisement for souvenir journal booklets, regional flyers, etc.
- Create the graphic designs for all Regional materials: (i.e.: Regional Leadership Conference & Regional Executive Board Meeting Booklets: (i.e. registration, workbooks, programs, invitations, etc.).

Healthy Living 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
- Program development experience, including visionary with strategic planning ability

Major Responsibilities and Duties:

- Serve as the Regional Healthy Living Coordinator.
- Facilitate the development, implementation, and scheduling of Healthy Living Programs throughout the Region.
- Assist with programming needs and coordinate the acquisition of ancillary personnel with appropriate skills/abilities to meet those needs for the Healthy Living Programs throughout the Region.
- Coordinate with the National Z-HOPE Chair to extrapolate the Z-HOPE documentation on Healthy Living programs throughout the Region.
- Create a year-end report to be submitted to the National Z-HOPE Chair in order for the information to be included in the overall National Z-HOPE report reflecting Healthy Living updates for the current fiscal year.
- Compile ad hoc reports upon request for the Regional Director, National Programs Director and/or the National Z-HOPE Chair.
- Create exercise programs to be included in the Atlantic Regional Leadership Conference agenda.

Historian

Skills/Knowledge:

- Superior knowledge of the history of the Atlantic Region.
- Superior oral and 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-through 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.
- Ability to secure information from appropriate sources.

Major Responsibilities and Duties:

- Prepare a narrative account of the Sorority's activities in the Atlantic Region from the last publishing through her term of office, which, when approved by the Regional Director and the Regional Executive Board, will become a part of the Atlantic Region's official sorority history. All accounts are the property of Zeta Phi Beta Sorority, Inc., Atlantic Region.
- Review the history of the Atlantic Region.
- 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 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.

Instructional Design Coordinator

Special Knowledge/Skills:

- Excellent oral/written communication, organizational and interpersonal skills
- Ability to use collaborative technology and work well with virtual teams
- Detail oriented
- Problem solving skills
- Experience working with a variety of software and platforms
- Ability to work one-on-one and in small groups in an instructional and consulting capacity across multi generations
- Strong customer service skills and professional demeanor
- Timely turnaround is required when dealing with incoming communication via phone calls, email ...

Major Duties and Responsibilities:

- Organize, coordinate and manage electronic migration and capture accurate data needed for new database on the regional level.
- Stay current with IT needs as we move Zeta toward excellence
- Consult with the National Director of Instructional Design on a regular basis to maintain clarity on rapid execution and establishment of IT related needs and solutions
- Maintain communication with the State Directors and the Regional Director regarding IT and instructional design goals, expectations and accomplishments
- Facilitate directives and webinars from the National Director of Instructional Design
- Perform hands-on training and troubleshooting for IT-related items for members of the respective states
- Facilitate directives and webinars from the National Director of Instructional Design
- Provide patient, professional and effective communication to members of their respective states regarding IT related needs.

Internal Audit Coordinator

Special Knowledge/Skills:

- In-depth knowledge of accounting procedures, financial reporting and auditing practices
- In-depth knowledge of internal auditing processes from initial assessment to report presentation
- Knowledge of project management processes and ability to utilize these tools
- Ability to identify problems, conceptualize solutions and report appropriately,
- Effective oral/written communication and interpersonal skills
- Certified Public Accountant preferred

Major Responsibilities and Duties:

- The Internal Auditor will serve as an independent entity, reporting to the Regional Director and the Regional Executive Board.
- Assess Atlantic Region Standard Operating Procedures for financial reporting for effectiveness, and clarity; advise Regional Director and the Regional 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. Evaluate 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 and/or the body
 - 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 the status
 - Ascertaining that taxes, licenses or corporate reports are properly filed in a timely manner.
- Prepare an annual report evaluating the efficiency and reliability of the financial reporting system for Atlantic Region using standard internal auditing procedures to be presented to the Regional Director and the Executive board.
- Coordinate the development of procedures and practices to facilitate the standardization of financial reporting on the Region and local levels.
- Assist in identifying a certified public accountant to review the books on a biennial basis after the change in officers.

Legal Counsel

Qualifications:

- Jurist Doctor in law
- Licensed and in good standing within a jurisdiction within the Atlantic Region

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 an advisor 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 Region Executive Board meetings and Atlantic Region Leadership Conferences to provide legal advice and to advise the leadership on various legal matters pertaining to the Region, if necessary.

Life Membership Coordinator

Special Knowledge/Skills:

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

Major Responsibilities and Duties:

- Serve as the Region representative, coordinator and spokesperson for Life Members.
- Work with the Regional Conference planning team on matters concerning Life Members programming.
- Chair the Life Members business session at Region meetings, set the agenda and coordinate the schedule.
- Work in conjunction with State and National Life Members Coordinators to ensure Life Members concerns/issues are researched and addressed on all levels.
- Create and maintain a listing of the Life, Golden, Platinum and Diamond Life Members in the Region.
- Enhance communication among current/new life members.
- At all Leadership conferences, ensure that Region Life Members are seated in the correct section and address any concerns they might have.
- Identify a community activity for Life Members within the Region to execute.
- Coordinate the documentation and maintenance of Zeta history as it relates to Life Membership in the Atlantic Region in coordination with the Region Historian.
- Develop introductory letter to be sent to all new incoming Life Members from the Regional Director and Life Member Coordinator.

March of Dimes Representative

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 experience 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 Region 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.
- 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 Regional Director/Region 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.

March for Babies Ambassador

Special Knowledge/Skills:

- Knowledge of the March of Dimes partnership with our organization
- Effective oral/written communications and interpersonal skills
- Effective presentation skills
- A member that has experienced premature birth of a child

Major Responsibilities and Duties:

- Serve as a resource for our March for Babies initiative
- Assist in the public relations related to March for Babies on behalf of the Atlantic Region

Marshal

Special Knowledge/Skills:

- Strong oral and written communication and presentation skills.
- Experience in development and fundraising.
- Effective interpersonal skills with ability to work across various committees; ability to participate in small groups, to bring out the best in others, and to 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-through on multiple projects from inception to completion.
- Knowledge and skills in strategic planning, creative development, and production of events
- Ability to remain calm under stressful situations

Major Responsibilities and Duties:

- Liaison between the Support/Host Chapter and the Atlantic Regional Director to execute the Regional Director's vision for the Atlantic Regional Leadership Conference (ARLC) or Atlantic Regional Executive Board Meeting (AREB).
- Transition with the Immediate Past Marshal for the ARLC or AREB, depending on the assignment.
- Assess talent within the Support Chapter and assign tasks accordingly
- Develop a list of subcommittees to meet the goals and objectives of the ARLC or AREB.
- Organize and oversee the various Planning Committee responsibilities.
- Identify and evaluate potential fundraising sources.
- Set goals, timelines and deadlines related to all aspects of the ARLC or AREB in accordance with the Regional Director's vision.
- Encourage chapter participation and support of the ARLC or AREB.
- Organize and convene Planning Committee meetings beginning at least 10 months prior to the ARLC and five months prior to the AREB.
- Work with the finance team and the Regional Director to ensure all aspects of the event remain within the stated budget.
- Prepare a final report and provide to the ARLC or AREB depending upon the meeting.

Meeting Planner

Special Knowledge/Skills:

- Effective oral and written communication and interpersonal skills.
- Ability to identify problems, conceptualizes solutions, and problem-solve via formal process.
- Ability to lead small groups, brings out the best in others, and arrives at consensus.
- In-depth knowledge of event planning.
- Contract review and negotiation skills.
- Professional Meeting Planner preferred.

Major Responsibilities and Duties:

- She shall have experience in negotiating contracts and managing projects.
- She shall be able to communicate effectively, orally and in writing, including using customer service skills.
- She shall be able to provide clear concise explanations when speaking in public, to groups, to management, and Board personnel.
- She shall have the ability to deal effectively with disgruntled individuals using tact and diplomacy.
- She shall have the ability to maintain confidentiality.
- She shall assist with developing pre-negotiation strategy and position contingent upon the type of contract negotiating.
- She shall assist with analyzing cost proposals including the elements of cost.
- She shall assist with reviewing preliminary proposals in order to ensure that the solicitation and/or contracts safeguard the sorority and confidential information as applicable.
- She shall assist with conducting debriefings with unsuccessful proposers describing the strengths, weaknesses, and risks of the proposal.
- She shall assist in monitoring contracts for potential serious problems and recommend innovative methods to rectify the issue(s).
- She shall assist with terminating contracts, when required; negotiate settlement with the contractor based on the termination type and contract terms and conditions; as well as, prepare termination settlement and closing documents.
- She shall assist with developing contractual language and clauses necessary for unusual services or research and development contracts.
- She shall assist with reviewing subcontracts, monitor contract deliveries and schedules; notify stakeholders of potential contractual problems.
- She shall assist with bringing closure to any disagreements with the contractor or vendor.

National Educational Foundation Coordinator

Special Knowledge/Skills:

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

Major Responsibilities and Duties:

- Serve as the Atlantic Region Representative for NEF initiatives implemented in the Atlantic Region.
- Encourage adherence to NEF information received from the NEF Board of Managers throughout the Atlantic Region.
- Develop ideas for Atlantic Region wide fundraising initiatives to benefit the NEF in conjunction with the Fundraising Coordinator and Committee.
- Submit periodic reports to the Regional Director on the status of NEF activities of the Region.

Necrology Coordinator

Special Knowledge/Skills:

- Effective oral/written communication and interpersonal skills
- In-depth knowledge of Necrology procedures and planning needs
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- Ability to work under pressure and within time constraints

Major Responsibilities and Duties:

- Serve as the Atlantic Regional Coordinator for Necrology.
- Serve as a resource person to the states in the Atlantic Region in reference to planning their Necrology services.
- Oversee the preparations for the Region's Necrology service.
- Officiate over the Necrology service at the Atlantic Regional Leadership Conference.
- Develop workshops and update materials on the proper way to conduct a Necrology service.
- Maintain a yearly listing of all members that have passed on to ensure their names are included in the Regional Necrology services.
- Prepare reports for submission by the Regional Director to the National Necrology Director.
- Assist with national observances as requested by the National Necrology Director.

Newsletter Editor-in-Chief

Special Knowledge/Skills:

- Experience working with modern graphic design software such as Adobe Illustrator, InDesign, or Canva.
- Ability to plan, format and execute projects and duties in a timely fashion.
- Superior writing and editing skills
- Effective oral and written communication and presentation skills.
- Possess a positive attitude and the ability to secure information from appropriate sources.
- Demonstrated ability to work in a high-performing, quality-driven, collaborative environment.

Major Responsibilities and Duties:

- Manage the production and distribution of the *Atlantic Advance*, ensuring the publications reflect the image and programmatic efforts of the Sorority and the Atlantic Region.
- Collaborate with Public Relations and Social Media Coordinators to promote communications for internal and external audiences.
- Develop themes and articles for publications under the direction of the Regional Director.
- Coordinate the design, layout and printing specifications for the newsletter.
- Create promotional flyers for chapter distribution and social media to solicit content for newsletter with at least four weeks' notice.
- Secure articles, photos, graphics and illustrations for the newsletter.
- Read, evaluate and edit material submitted for publication. Follow up with regional chapters regarding submission errors or clarifications (as needed).
- Conduct research, verify facts and develop articles for publication.
- Review final proofs and coordinate approval for print with Regional Director.
- Assist with the print and online publication of the regional newsletter.

Photographer

Special Knowledge/Skills:

- Effective oral communication and interpersonal skills
- Require a strong attention to detail and work effectively under tight deadlines
- Ability to plan, format, and execute projects and routine duties in an accurate and timely manner
- Background in photography

Major Responsibilities and Duties:

- Serve as the Region official photographer for all events/Leadership Conferences.
- Submit all photographs taken at Regional events/Leadership Conferences to the Regional Director for her review and selection.

Protocol Coordinator

Special Knowledge/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 Atlantic Region representative on protocol and rituals ensuring that all policies and procedures are disseminated and adhered to by the Region.
- Develop and revise the Protocol procedures in accordance with the National Protocol Manual and distribute as needed.
- Facilitate the development, implementation, and scheduling of protocol workshops throughout the Region.
- 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.
- Works with the Events Coordinator/Regional Marshal 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.
- Develop and implement a plan that ensures all dignitaries receive appropriate correspondence, invitations, receive special welcome letter from the Atlantic Regional Director and other appropriate material such as the Conference Guidebook etc.
- Develop a job description for hostesses and escorts.
- Create a detailed protocol work schedule in alignment with the conference schedule.
- Conduct appropriate training for volunteers serving as protocol escorts and hostesses. Training to encompass proper etiquette, assertiveness, personal safety, risk management, customer service, etc.
- Provide escorts for the Regional Director, Past Regional Directors, and all other regional and visiting dignitaries; create personal itineraries for each person to ensure timely arrival at their designated location.
- Coordinate seating of dignitaries, guests and program participants – develop with the Events Coordinator, seating diagrams, plot entrances and exists for VIP's, and chart the timing for each person's appearance as appropriate.
- Check rooms and suites to ensure that everything is acceptable and that the appropriate amenities are in the room.

- Develop 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.
- Coordinate and manage the dais line-up; other VIP line-ups and work with the Meeting Planner and Regional Director to ensure waiting area is properly reserved and stocked with light refreshments.
- Develop workshops and update materials on the proper way to handle the art of protocol
- Review National Protocol Manual and incorporate Regional component if needed.
- Develop a Protocol and Amenities PowerPoint presentation for chapter distribution.
- Identify amenities for dignitaries.
- Keep a log of all purchased amenities.
- Serve as a member of the ARLC (Atlantic Regional Leadership Conference) and the Executive Board planning committee, and perform extensive duties at the ARLC as directed by the Regional Director.
- Provide technical services (e.g., script for public programs) to chapters, and Zeta Auxiliaries in preparation for public events where protocol is required.

Public Relations Coordinator

Special Knowledge/Skills:

- Superior oral/written communication and presentation skills
- Effective interpersonal skills with ability to work across committees, 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
- Organizational skills, ability to follow through on a project from inception to completion, perform under tight schedules.
- Ability to maintain and represent a positive image for the region.
- Exceptional marketing skills
- Ability to execute within a specified deadline
- 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.
- Degree in Public Relations, Marketing or Journalism preferred

Major Responsibilities and Duties:

- Work with the Regional Director to develop a comprehensive internal and external communications strategy to promote regional initiatives and convey key messages to the private and public constituency.
- Work cooperatively with the Atlantic Region Social Media Coordinator and Webmistress to centralize communication efforts.
- Assist in the development of themes for all regional communications.
- To be a conduit and resource of information regarding programming in communities within the Atlantic Region.
- To share and promote messages from the Atlantic Regional Director and other leadership that could be of interest to the general public.
- Effectively promote the programs, initiatives and ideals of the sorority and specifically the Atlantic

Region.

- To work with state and local public relations coordinators to coordinate consistent messaging and to share best practices and relevant information that could be shared on a regional level.
- To work with other key coordinators throughout the region to promote key strategy.
- Develop written communications for press release.
- Ensure that all members are stimulated, motivated and guided to contribute fully to the realization of the Sorority's and specifically the Region's mission, vision, goals and objectives.

Reclamation 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
- Effective presentation skills

Major Responsibilities and Duties:

- Serve as the Regional Reclamation Coordinator.
- Assist chapters in the region in creating reclamation drives/programs.
- Provide periodic status updates to the Regional Director upon request.
- Develop/host workshops/seminars on effective ways on how to successfully reclaim members.
- Compile reports as directed for the Atlantic Regional Leadership Conferences

Rededication Coordinator

Special Knowledge/Skills:

- Effective oral/written communication and interpersonal skills
- In-depth knowledge of the Rededication observance and planning needs
- Ability to lead small groups, bring out the best in others, and arrive at consensus
- Ability to work under pressure and within time constraints

Major Responsibilities and Duties:

- Shall serve as the Region Rededication Coordinator.
- Shall serve as a resource person to the States and chapters in the Atlantic Region in reference to planning their Rededication ceremonies.
- Shall oversee the preparations for the Rededication Ceremony.
- Shall create the program for the Rededication Ceremony.
- Shall send out correspondence relating to the preparations for Rededication at the Regional Leadership Conference.
- Shall officiate over the Rededication Ceremony at the Atlantic Regional Leadership Conference.
- Shall develop workshops and update materials on the proper way to conduct Rededication in accordance with the National Handbook and at the direction of the Regional Director.

Registrar

Special Knowledge/Skills:

- Effective listening, oral and written communication and interpersonal skills
- Exemplary planning and organizational skills along with a high degree of detail orientation
- Innovative problem solving and ability to generate workable solutions and resolve complaints
- Resourceful team player with the ability to take the lead and maintain a productive climate
- High degree of computer and technical literacy
- Ability to be flexible and adapt to sudden change
- Ability to manage multiple priorities

Major Responsibilities and Duties:

- Create the registration form for the regional meetings (executive board meeting and leadership conference)
- Receive and log paper registrations and payments
- Monitor online registrations and log on master registration spreadsheet
- Send the paper registration payments to the Regional Tamias Grammateus
- Report to the Regional Director and Conference Marshal registration numbers and updates as requested (usually monthly until we are about 6 weeks out when the reporting becomes weekly)
- Prepare the registration schedule for check-in at the meeting
- Prepare sign-in sheets for check-in at the meeting
- Monitor the registration process at the meeting
- Prepare the name tags for the meeting
- Give the credentials report at the start of each plenary session during the meeting
- Collaborate with the Regional Director, Meeting Planner and Meeting Marshal for the ultimate success of the meeting registration process
- Create, print and distribute Certificate of Attendance for all attendees

FYI - It is helpful if you are in a position to purchase all needed supplies and wait to the end of the meeting for all reimbursements. Be sure to get approval from the Regional Director before making any purchases for which you are expecting reimbursement.

Scholarship Coordinator

Special Knowledge/Skills:

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

Major Responsibilities and Duties:

- Serve as the Scholarship Coordinator.
- Solicit committee members.
- Work in conjunction with committee members to promote the raising of funds for the Region Scholarship fund.
- Ensure yearly scholarship forms/information is disseminated to all chapters.
- Work in conjunction with committee members to review all scholarship applications and make the final determinations on the scholarship recipients.
- Work with Regional Director for the presentation of scholarships to the recipients.
- Complete a voucher; submit to the Regional Director and Tamias; and secure scholarship monies from the Tamias for presentation to recipients
- Submit final wrap up report to the Regional Director and the Regional Executive Board once recipients are chosen.

Social Action Coordinator

Special Knowledge/Skills:

- Experience with government, politics and/or public administration.
- Effective oral/written communication and interpersonal skills.
- Ability to lead small groups.
- Ability to plan, format and execute projects and duties in an accurate and timely manner.
- Project and team management skills.
- Possess a positive attitude and the ability to secure information from appropriate sources.
- Demonstrated ability to work in a high-performing, quality-driven, team-based environment.

Major Responsibilities and Duties:

- Work closely with the Atlantic Regional Director and the National Director of Social Action.
- Coordinate the operation of social action programming for chapters and auxiliaries in the Region.
- Share information and facts on important social action matters to educate, inform and mobilize chapters/auxiliaries to address issues within their local communities.
- Field and answer telephone calls and email messages from sorors/Amicae with questions regarding local social action events and/or programs.
- Share public information on the Region Facebook Fan page that pertains to social and civic news.
- Schedule and confirm social action meetings for the Regional Director as needed.
- Distribute important information and facts for future social action programming and events.
- In conjunction with the National Director of Social Action, assist in planning Zeta Day on Capitol Hill upon her request.
- Assist chapters in organizing congressional, senatorial and or regional representative visits in Washington, DC and other capitals within the Atlantic Region.
- Work in tandem with the Regional Media Relations Team to disseminate information.

Social Media Coordinator

Special Knowledge/Skills:

- Superior oral/written communication and presentation skills
- Effective interpersonal skills with ability to work across committees, 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 through on a project from inception to completion; and 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:

- Work with the Regional Director and the Public Relations Coordinator to manage the Region 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.
- 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 Regional Conferences, Prematurity Awareness, March of Dimes, etc.
- Support the oversight of design and content development of the Atlantic Region Website in

conjunction with the Webmistress and Public Relations Coordinator, at the direction of the Regional Director.

- Monitor public source materials for items of interest to the Region, including social media portals to ensure protection of the Region's brand, and to understand current climate with respect to non-profit/Greek activities.
- 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 the Region's mission, vision, goals and objectives. Empower members to identify innovative approaches to enhance organizational performance.

St. Jude 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, bring out the best in others, and arrive at consensus.
- Effective presentation skills.
- Program development experience, including visionary with strategic planning ability.
- Ability to motivate and increase investment in the initiative.

Major Responsibilities and Duties:

- Participate in training to become familiar with the mission of the foundation to feel comfortable answering questions and encouraging chapters to participate.
- Create a committee to assist and support Atlantic Region Chapters with becoming educated and implementing programs and fundraisers to benefit St. Jude.
- Schedule quarterly conference calls with St. Jude Representatives from each chapter.
- Create and maintain a contact list of key people related to this initiative.
- Create an annual report and include photos and information from the region related to programs and fundraising efforts for this initiative, which shall be submitted to the Regional Director.
- Develop relationships with local blogs and newspapers to advertise programs and fundraising efforts to benefit St. Jude.
- Develop a calendar of St. Jude events and fundraisers to be distributed to all chapters within the Region.
- Assist Chapter Representatives with completing the Z-Hope Form.
- Collaborate with the Region Z-Hope Coordinator to create a competition for both undergraduate and graduate chapters as it relates programming and fundraising for St. Jude and award the top undergraduate and graduate chapters who have implemented the most creative program and raise the most money.

Standard Operating 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, bring out the best in others and arrive at consensus.
- Effective presentation skills.
- In-depth knowledge of organizational policies and procedures
- Proficiency with Microsoft Office software
- Flexibility

Major Responsibilities and Duties:

- Maintain the Atlantic Region Standard Operating Procedures (SOP) Manual.
- Incorporate changes and ensure SOP is current and updated as needed.
- Provide technical assistance to states interested in developing a SOP.

Stork's Nest 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 Region 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 Region.
- Facilitate the development, implementation, and scheduling of Stork's Nest Program reporting (funding/incentive items/# of participants) throughout the Region.
- Coordinate with the Atlantic Region Z-HOPE chair to extrapolate the Z-HOPE documentation on Prematurity Awareness chapter initiatives across the Region.
- Create a year-end report to be submitted to the Region 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.
- Work with the National Stork's Nest Director to ensure all Nests within the Atlantic Region are in compliance.
- Serve as a resource for chapters within the Atlantic Region that are interested in opening a Nest.

Undergraduate Advisor

Special Knowledge/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.
- Effective knowledge of membership development.
- Inducted in an undergraduate chapter.
- Positive rapport with sorors in undergraduate and graduate chapters.

Major Responsibilities and Duties:

- Shall have the responsibility of voicing the concerns of the undergraduate members.
- Assist in implementing the directives of the Regional Director and the Regional Executive Board as it relates to undergraduates.
- Work with the Regional Director and the undergraduate chapters in interpreting the state/regional and national programs as they relate to undergraduate chapters.
- Work with the Regional Director to facilitate and implement the scheduling of undergraduate chapters/officers/members and develop and present workshops throughout the Atlantic Region.
- Serve in a supportive role to aid and assist in dealing with undergraduate issues and concerns.
- Work closely with the Regional Director and the Regional Events Planner on all logistical/programming matters as they relate to Regional Undergraduate retreats.

Undergraduate Member at Large

Special Knowledge/Skills:

- Must be a financial member of an active undergraduate chapter throughout the term of office.
- Effective oral and written communication and interpersonal skills.
- Ability to identify problems, conceptualize solutions, and problem-solve via formal process.
- Ability to plan strategically
- Availability to meet with the National Undergraduate Committee

Major Responsibilities and Duties:

- Shall represent the Atlantic Region on the National Undergraduate Committee.
- Shall be financial on the national, regional, state and local levels.

Vendor 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, bring out the best in others, and arrive at consensus as a team to ensure cohesive operations of all exhibitors.
- Effective negotiation skills.
- Strategic planning and pricing capabilities
- Ability to manage and coordinate activities of suppliers to ensure products and services meet standards of service quality excellence.

Major Responsibilities and Duties:

- Effective management of relationships with external vendors to provide products and services at all Atlantic Region Events and Conferences.
- Create vendor letter, prospectus and application for final review and approval.
- Create and maintain a list of vendors by type of products and services and review/update list bi-annually.
- Monitor and ensure all vendors selling Zeta Phi Beta Sorority, Inc. and Amicae paraphernalia are licensed vendors by National.
- Create all contracts and applications for vending opportunities to include instructions, requirements, pricing, contact information.
- Ensure all licensed vendors selling Zeta Phi Beta Sorority, Inc. and Amicae paraphernalia provide a copy of license with all applications submitted to vend at all Atlantic Region Events and/or Conferences.
- Ensure that any non-licensed vendor who attempts to sell Zeta Phi Beta Sorority, Inc. and/or Amicae paraphernalia is asked to cease and desist immediately and remove all such merchandise from display.
- Maintain an up to date listing of all vendors licensed to sell Zeta Phi Beta Sorority, Inc. and Amicae paraphernalia.
- Maintain copies of all contracts and payments for vendor applications for Atlantic Region Events and Conferences.
- Respond in a timely manner to all inquiries from prospective vendors concerning opportunities to vend at Atlantic Region Events and Conferences
- Ensure any issues and/or problems with materials supplied by vendors are documented and appropriate measures are undertaken to resolve issues that were identified.
- Collaborate with Event Planning Committee members to determine allocation of space at Venue that will aid in evaluating the number of vending opportunities available.
- Communicate with all vending suppliers throughout Program and provide guidance and direction.
- Provide report of vending experiences at the conclusion of all programs that will include any issues encountered and corrective measures undertaken.

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 on the website, 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.
- Craft site promotions, email newsletters, and online outreach campaigns.
- Keep current with emerging web technologies through relevant blogs, listservs, 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 Regional Director.

Youth Auxiliaries Coordinator

Special Knowledge/Skills:

- Effective oral and written communication and interpersonal skills.
- Ability to identify problems, conceptualizes solutions, and problem-solve via formal process.
- Ability to lead small groups, brings out the best in others, and arrives 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 Atlantic Region representative, coordinator, and spokesperson for the Zeta Youth Auxiliaries' Program.
- With the assistance of the Regional Director, plan, organize and execute Region Leadership Conference for the Youth.
- 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 Region.
- Facilitate the development, implementation, and scheduling of youth, advisors and volunteer workshops throughout the Region.
- Facilitate the development of programming and implementation/scheduling of Region Youth summits.
- Facilitate the development of on-going comprehensive training programs and materials for Youth advisors on local levels.
- Coordinate the development and 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 Region-recognized, comprehensive, modular-format, leadership-focused program with elements to address: 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.*
- Monitor the region's programming of Youth Auxiliaries.
- Identify, plan and execute a Regional activity and/or program for Youth Auxiliaries.
- Facilitate the development of Youth training workshops and materials.

Z-HOPE Coordinator

Special Knowledge/Skills:

- Effective oral and written communication and interpersonal skills
- Ability to identify problems, conceptualizes solutions, and problem-solve via formal process.
- Ability to lead small groups, brings out the best in others, and arrives at consensus
- In-depth knowledge of current Z-HOPE 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 Region representative, coordinator, and spokesperson for all Z-HOPE 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 Z-HOPE Initiatives.
- Coordinate the development of procedures and practices to facilitate the standardization of programming and operations of each Z-HOPE component statewide
- Facilitate the development, implementation and scheduling of Z-HOPE workshops throughout the Region.
- Facilitate the development of programming and implementation/scheduling of Atlantic Regional Z-HOPE Initiatives.
- Facilitate the development of on-going comprehensive training programs and materials for Z-HOPE Coordinators on local levels.
- Coordinate the development and implementation of practices and procedures to facilitate a safe/risk-free programming via risk management planning, including comprehensive coordination of manual/training, and a "risk prevention reporting system".
- Develop strategic planning to facilitate the development of long-term planning of Z-HOPE programming for the Atlantic Region.
- Receive and compile reports submitted by chapters and auxiliaries for conferences and executive board meetings.
- Ensure chapters are aware of the implementation guidelines and points system.
- Monitor Zeta's region-wide participation in Z-HOPE activities.
- Work with team members.
- Create a year-end report to be submitted to the Atlantic Region 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.

Zeta Dove Coordinator

Special Knowledge/Skills:

- Proficient in Microsoft applications (Excel, PowerPoint, Word and Access).
- Effective oral/written communication skills.
- Possess a positive attitude and the ability to secure information from appropriate sources.
- Strong interpersonal and organizational skills.
- Effective presentation skills.
- Organizational skills and ability to follow-thru on a project from inception to completion.
- Knowledge and skills in data collection and reporting.

Major Responsibilities and Duties:

- Develop a Zeta Dove demographics survey for the Region.
- Maintain a current listing of Zeta Doves in the Atlantic Region.
- Organize a recognition ceremony for Zeta Doves at the Atlantic Regional Leadership Conferences.
- Develop a semi-annual newsletter especially created for Zeta Doves or a section in the regional newsletter in conjunction with the Region's Editor-in-Chief.

Zeta Male Network (ZMN)

Special Knowledge/Skills:

- Knowledge of the purpose, structure and operation of the Zeta Male Network a plus.
- Effective oral/written communication skills
- Possess a positive attitude and the ability to secure information from appropriate sources
- Strong interpersonal and organizational skills
- Effective presentation skills
- Ability to work under pressure and within time constraints

Major Responsibilities and Duties:

- Serve as the Region representative for the Zeta Male Network (ZMN) programming.
- Assist with coordinating opportunities for the ZMN members to participate in service project and events sponsored by chapters.
- Coordinate opportunities for the ZMN members to interact with other men whose lives are richly impacted by members of the Sorority.
- Ensure that all ZMN are in receipt of Boulé registration information.
- Determine programming needs for ZMN members and make recommendations.
- Develop methods to track ZMN membership within the Region and develop a roster.
- Identify methods of communicating with the Region ZMN.

Zeta Partnerships Coordinator

Special Knowledge/Skills:

- Excellent oral and written communication skills
- Experience working on multiple assignments

Major Responsibilities and Duties:

- Serve as the point person for the region for all concerns pertaining to the National partners.
- Assist the Regional Director in disseminating materials and information from the National Director of Partnerships in conjunction with the specific partner coordinators.
- Follow up to ensure that all chapters and auxiliaries received the information and respond to any questions.
- Assist the Region with implementing the programs and initiatives of the various organizations in conjunction with the specific partner regional coordinators and state coordinators.
- Collect data for reporting purposes
- Ensure that data is gathered by and collected from all states.
- Compile and submit information regarding regional activities related to our partner organizations to the Regional Director.
- Perform additional tasks as requested by the Regional Director.

Undergraduate Representative to the Undergraduate Advisory Committee

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

Major Responsibilities and Duties:

- Serve as the Region Undergrad Representative to the Undergraduate Advisory Committee.
- Be responsible for voicing the concerns of undergraduate members in the Region.
- Assist in implementing the directives of the Regional Executive Board as it pertains to undergraduates in the Region.
- Assist the advisory committee in interpreting the regional and national programs as they relate to undergraduate chapters throughout the Region.
- Assist the committee with formulating a status report to be submitted to the Regional Director upon request.
- Assist the committee with creating the program for the Undergraduate Luncheon at the Regional Leadership Conference.
- Assist the committee in various training workshops that will further enhance the knowledge of undergraduates across the Region.

Atlantic Regional Director Transition Procedures

The newly appointed Atlantic Regional Director shall schedule a meeting to transition with the Immediate Past Atlantic Regional Director after the International Grand Basileus announces the new Regional Director leadership within the Atlantic Region. The International Grand Basileus will usually specify the time period by which the transition must occur. Absent a directive by the International Grand Basileus, the transition must be completed within 30 days of notice by the International Grand Basileus of the newly appointed Atlantic Regional Director.

Transition Instructions for the Atlantic Regional Director

- Shall turn over all Duties and Responsibilities documentation for elected and appointed Region officers.
- Shall turn over final wrap up financial reports for the past Regional meetings during her administration.
- Shall turn over copies of hotel contracts for the past Regional meetings during her administration.
- Shall turn over final wrap up financial reports for the past Executive Board meetings during her administration.
- Shall turn over copies of hotel contracts for the past Executive Board meetings during her administration.
- Shall turn over final wrap up financial reports for the Past Region Basilei Retreats during her administration.
- Shall turn over copies of hotel/conference venue contracts during her administration.
- Shall turn over copies of all previous (received) Regional Director reports.
- Shall turn over final membership stats (i.e. Graduate/Undergraduate/Life Members/Golden/Platinum/Diamond Life Members)
- Shall turn over final chapter stats (i.e. Graduate/Undergraduate).
- Shall turn over final auxiliary stats (i.e. Youth groups/Amicae groups).
- Shall turn over final membership auxiliary stats (IE: Youth/Amicae members).
- Shall turn over listing of chartered chapters during her administration.
- Shall turn over copies of all chapter charters (if in her possession).
- Shall turn over the final financial reports.
- Shall turn over a copy of the Region Standard Operation Procedure Manual.
- Shall turn over a copy of the Region Protocol Manual.
- Shall turn over information on Region Storage (i.e. contact information, keys, etc.).
- Shall turn over any pending investigation documentation.
- Shall turn over copies of documentation on chapters and sorors suspension as per National.
- Shall turn over documentation on all active Region partnerships.

- Shall turn over schedule for recurring bills (i.e. Storage, Website domain, etc.).
- Shall turn transition all passwords (i.e. banking, survey, website, storage, Eventbee, Eventbrite, etc.)
- Outgoing Regional Director shall destroy regional credit card in the presence of the incoming Regional Director

Atlantic Region Elected Officer Transition Procedures

After an election (or when a soror resigns), all officers (outgoing and incoming) are to schedule a transition meeting. Elected Officer Transitions are important in order to affect continuity and a certain standardization of required material that should be passed on from the outgoing officer to the incoming officer so that the newly elected officer can carry out her duties and responsibilities of the office. Typically, there is a brief transition meeting at the conclusion of the leadership conference. A follow-up detailed meeting should take place within one month after the Atlantic Regional Leadership Conference. The Finance Team should **complete** transition no later than 45 days after elections so as not to disrupt the running of the Region.

Suggested Outgoing Officer Checklist

- Organize all binders, files and electronic documents of all-important information (e.g. policies, financial reports, budgets, procedures, bylaws, strategic plan, etc.)
- Finish all necessary correspondence (e.g. letters, emails, reports, etc.)
- Turnover SOP, handbooks and or other hard copies of documents pertaining to the position.
- Develop suggested action plan and timelines for new officer
- New Officer responsibilities
- Calendars/timelines
- Electronic copies of flyers, newsletters, etc.
- Meeting agendas
- Meeting minutes
- Templates for forms
- Budgets from prior years
- Checking account information (if applicable)
- Any login information or passwords (if applicable)

Transition Information for the Grammateus

- Shall turn over a copy of the Atlantic Region SOP manual.
- Shall turn over all Executive Board Meeting Minutes and corresponding documentation from her entire tenure and previous terms within her possession and in accordance with the retention policy.
- Shall turn over all Leadership Conference Minutes and corresponding documentation from her entire tenure.

Transition Information for the Tamias

- Shall turn over a copy of the Atlantic Region SOP manual.
- Shall turn over financial record binders (which will include copies of expense/reimbursement vouchers, online banking statements, and quarterly reports).
 - Most recent binder should stay with the newly elected Tamias.
 - Older binders can be prepared for storage. (Presently, all storage is with Iron Mountain)
- Shall turn over Disbursement Vouchers.
- Shall turn over the Atlantic Region check book.
- Shall turn over the most current copy of the minutes.
- Shall turn over copies of all past Tamias reports.
- Shall provide contact information of the outgoing Tamias
- Outgoing Tamias shall destroy regional credit card in the presence of the incoming Tamias.

Change of Bank Ownership: At the beginning of each new administration, the current and/or Immediate Past Atlantic Region Director, Grammateus and Tamias will go to the bank (within their area), in order to have the former officer's name(s) removed from the account and have the new officer's name(s) added to the bank account. Usually 2 forms of governmental issued identification are needed to update the bank account. A copy of the minutes Region change in leadership (Tamias and Grammateus) will be required at the time of visit to the bank. In the case of the Atlantic Region Director, an official announcement from the International Grand Basileus will be presented to the bank as supporting documentation, without the Immediate Past Atlantic Region Director being present.

Required Supplies:

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

Atlantic Region Transition Information for the Tamias Grammateus

- Shall turn over a copy of the Region SOP manual.
- Shall turn over financial record binders (which will include copies of 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 Chapter Assessment Forms.
- Shall turn over Reimbursement Vouchers.
- Shall turn over the most current listing of chapters in the Region with the appropriate mailing addresses.
- Shall turn over 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 Region Assessment financial reporting forms.

Atlantic Region Transition Information for the Phylacter

- Shall turn over a copy of the Region SOP manual.
- Shall turn over a current copy of the Region Bylaws.

Appointed Officers Transition Procedures

Many officers/coordinators are appointed by the Atlantic Regional Director and serve at her discretion. The Regional Director may replace an appointed officer. When a new Regional Director comes into office, all appointed positions are vacated and she may appoint a different soror to hold an existing position or reappoint the same soror to hold the existing position. If a soror is newly appointed, a transition meeting must be held for Appointed Officers, Coordinators, etc. This meeting should take place within one month after the appointment by the Regional Director. By accepting an appointed position, you are also agreeing to comply with the region's transition procedures when you go out of office.

Suggested Outgoing Appointed Officer/Coordinator Checklist

- Organize all binders, files and electronic documents of all-important information (e.g. policies, budgets, procedures, strategic plan, event programs, etc.)
- Finish all necessary correspondence (e.g. letters, emails, reports, etc.)
- Electronic copies of flyers, newsletters, etc.
- Meeting agendas
- Meeting minutes
- Templates for forms
- Budgets from prior years

Suggested Agenda for Transition Meeting

- Responsibilities of the office.
- Timeline for completing duties of the position.
- Major accomplishments.
- Unfinished projects.
- Opportunities for improvement.
- Important resources and contacts.
- Mistakes the outgoing officer made that could have been avoided—i.e. lessons learned.

Financial Administration

Financial management is significant as it relates to taking the optimum responsibility of overseeing the Region's funds. With careful management, and a good understanding of the business protocol of working with an organization's finances the financial team should be able to protect the Region from the precarious mismanagement of monies.

Independent Financial Review

The financial records shall be audited or reviewed biennially and/or at the beginning of a new administration and at other times as requested by the Executive Board. All reports of the independent accountant shall be submitted to the Executive Board for approval. The budget and finance committee shall be authorized to manage the engagement.

Financial Policies and Procedures – Finance Team

Tamias

- **Signers on Bank Account:** Signers on the bank account: Regional Director, Grammateus and Tamias.
- **Bank Account:** Only the authorized signers will have access to the account to make purchases, payments, and transfer of funds, issue checks, perform online banking and open/close bank accounts. There shall be at least 3 regional bank accounts – operating, scholarship, and special accounts/conferences. No account may be opened without the approval of the Finance Team.
- **Bank's Check Policy:** 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 Atlantic Region Director to reissue a check to the payable party.
- **Bank Statement:** Statements or any bank correspondence is to be sent to the Tamias' mailing address only (or electronically). Once received, statements are to be reconciled on a monthly basis against the general ledger.
- **Budget:** The Tamias must maintain a copy of the approved updated budget for the current sorority year to ensure the Region's expenditures are in accordance with each budget line item. **Budget line items may not be exceeded without the approval of the Budget & Finance Coordinator and Regional Director.** Any overage, anticipated or submitted, shall be called to the attention of the

Coordinator and shall be paid by the Region upon the authorization of the Coordinator and provided in writing to the Regional Director for final authorization.

- **Chapter Financial Reporting Form:** The Tamias Grammateus is responsible for submitting a report to the Tamias and Budget and Finance Coordinator of all chapter assessments received with a copy of each individual Chapter Financial Reporting Form and copies of the checks that were received by the Tamias Grammateus for each deposit made.
- **Deposits:** Monies collected must be deposited within 72 hours of receipt from the Tamias Grammateus into the Atlantic Region's bank account.
- 1. **Expense Reimbursement:** All reimbursements are contingent upon availability of funding in approved budget.
 - a. All requests for reimbursement are to be submitted to the Tamias no later than 10 days following transaction for approval. Requests by the Regional Director are to be submitted to the Tamias and Grammateus for approval within 10 days of transactions.
 - b. Requests should be submitted to the Tamias by expense voucher form accompanied by the original receipt of purchase.
 - c. **The Tamias** must also submit an expense voucher with original receipt of purchase to the Atlantic Region Director for approval.
- 1. **Financial Reports:** Income and Expense Reports must include the amount of any un-cleared transactions by line item and must be submitted to the Financial Team on a quarterly basis, as of the last day of the month, according to the schedule determined by the Budget and Finance Coordinator. These reports must be reconciled by the financial team and agree to the automated financial system to ensure accuracy.
 - a. The most current quarterly report in relation to the timing of the Executive Board Meeting and/or Regional Conference will be submitted for and presented at those meetings.
 - b. Provide a report of the Expenses of the Regional Conference and Executive Board Meeting to the Financial Team two weeks prior to the start of the particular event.
 - c. Provide a report of the Income and Expenses of the Regional Conference and Executive Board Meeting to the Financial Team two weeks after the close of the event.
- **Lost/Stolen Checks:** Payee must notify the Tamias as soon as possible if issued check has been lost or stolen. The Tamias shall notify the financial institution in order to request a stop payment on the issued check. (An expense is incurred with stop payments and this should be approved by the Atlantic Region Director. No stop payment should be done for checks lower than the stop payment fee).
- **Paypal/Memberplanet (other online electronic payment vendor) Account:** The Tamias will receive/download reports from the company when deposits are made into the bank account and the Tamias will electronically forward a copy of the online report to the Finance Team.

- **Refunds:** Overpayment of a Chapter's regional assessments or other approved refund will be reimbursed by the Tamias in the form of a check within 30 days.
- **Region's Checks:** All Region issued checks must contain the signatures of both the Tamias and Atlantic Region Director. Also these two officers are the only officers that can issue checks except when the Grammateus shall sign off on reimbursements for the Atlantic Region Director or under unusual circumstances with the approval of the Budget and Finance Chair.

Tamias Grammateus Procedures

Required Supplies:

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

Disseminate assessment forms to chapters **beginning August 15 and completed no later than August 30 of each fiscal year.**

Receive assessment forms and monies from chapters:

Record monies received

- Log in the payment into the Quickbooks or other financial software
- **Assessments must be received by October 31** of each Sorority year – **Post marking does NOT count. Assessments received after October 31** are considered late and the chapter must be assessed the pre-determined late fee.
- Notify chapter in writing of monies received, still owed (if necessary due to late fees or underpayments), and number of financial members
 - Underpayment – any chapters not paying all fees in full, will be considered un-financial and notification must be sent to the chapter
 - **Chapters have 30 business days** after notification to clear the debt.
 - Notification of all un-financial chapters is to be sent to the Regional Director and the rest of the Financial Team by November 30, prior to regional meetings, and as requested.
- **Submit monies received to Tamias for deposit within 3-5 business days**
- **Record and receipt all sources of payment**

Reports:

- Income reports must be submitted to the Financial Team on a quarterly basis, as of the last day of the month, according to the schedule determined by the Budget and Finance Coordinator. These reports must be reconciled by the financial team to ensure numbers of financial members and all receipt categories match with the Tamais' records and reports.

- Membership assessment reports shall be submitted to the financial team on a monthly basis to ensure that financial member numbers are reconciled with all other records. **Note: chapters must be financial on all levels in order for members to be counted in per capita numbers.**
- The most current quarterly report in relation to the timing of the Executive Board Meeting and/or Regional Conference will be submitted for and presented at those meetings.
- Provide a report of the income for the Regional Conference and Executive Board Meeting to the Financial Team two weeks prior to the start of the particular event and then two weeks after the close of the event.

Budget and Finance Coordinator Procedures

- All budget requests must be first submitted to the Regional Director by a specified date for a future budget period and as soon as possible during the current budget period.
- Budget requests approved by the Regional Director will be forwarded to the Coordinator.
 - Current budget year requests: These requests will be considered with the Financial Team based on the overall impact on the budget and current financial position of the Region. If approved, the revised budget will be presented at the next scheduled Executive Board Meeting or Regional Conference. If accepted, an updated budget is to be disseminated to all officers no later than two business weeks following the Executive Board Meeting.
 - Future budget year request: These requests will be considered by the Financial Team and included in the budget proposal for the applicable budget year, if feasible. Final approval of the request will be made at the next Regional Conference as part of the overall budget presented.
- A comprehensive proposed budget prepared by the Coordinator with consultation from the Financial Team must be disseminated to Elected and Appointed Officers for review at least two weeks prior to the Executive Board Meeting and Regional Conference.

Budget Preparation

- The Coordinator shall develop, with consultation from the Finance Team, a biennial budget including anticipated revenue from assessments, Regional conference, Executive Board Meetings, and other program and revenue sources.
- The membership shall adopt a budget prior to beginning the fiscal year for which it is to take effect at the Regional Conference.
- The budget shall include line items for ordinary and necessary expenses for members of the Executive Board, and Standing and Special committees when conducting Atlantic Region business. Ordinary and necessary expenses shall include travel and accommodations, meals, supplies, postage, telephone, and other expenses incidental to travel subject to any limits established within the adopted budget.

- Separate detailed budgets for the Executive Board Meeting and Regional Leadership Conference should also be developed in accordance with the planning timeline.

Budget Line Overages

Budget line items may not be exceeded without the approval of the Budget and Finance Coordinator and Regional Director. Any overage, anticipated or submitted, shall be called to the attention of the Coordinator and shall be paid by the Region upon the authorization of the Coordinator and provided in writing to the Regional Director for final authorization. In the event that the Regional Director is requesting the over expenditure, the request will require the authorization of the Regional Tamias in lieu of the Regional Director.

- Requests for additional funding in line items must be in writing to the Regional Director or Budget and Finance Coordinator, if it is from the Regional Director, for approval.
- The Regional Director and/or Budget and Finance Coordinator must notify the Executive Board on the approval status and its potential impact on the current budget.

Budget Management

- A budget report shall be prepared quarterly and reported as of the last day of the month. Budget reports will be based on reconciled reports provided by the Tamias and Tamias Grammateus.
- A budget report shall be disseminated to all Regional officers no later than 2 business weeks following the end of the month.
- On a quarterly basis, the Coordinator will inform the Financial Team of expense line items with a zero or negative balance.
 - To use these line items will require the approval of the Budget and Finance Coordinator and Regional Director. **Note: other unrelated line items that are under-budget cannot be used to account for such expenses unless so authorized by the Coordinator.**
- On a monthly basis the Budget and Finance Coordinator will assist in the reconciliation of the financial information in the automated financial software.
- Using the information available in the software, the Coordinator will also authorize disbursements based on the cash flow as recorded.

Internal Audit Procedures

Introduction:

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

Compliance with National:

Zeta Phi Beta Sorority, Inc. – Atlantic Region 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., Atlantic Region**:

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

Audit and Finance Subcommittee:

The committee should be made up of Atlantic Region Zetas who have a familiarity with the organization's 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 Region's 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 to 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 and/or the body.
- 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 the status.
- Ascertaining that taxes, licenses, or corporate reports are properly filed in a timely manner.

The Internal auditor does not make managerial decisions or mandate actions. The internal audit team makes recommendations based on their review.

Conference Registration Guidelines

Atlantic Region Leadership Conference

- Conference expenses of the Grammateus, Anti-Grammateus, Tamias, Tamias Grammateus and the Phylacter, shall be paid by the Region in accordance with the adopted budget.
- 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.
- The Atlantic Region Representative to the National Nominating Committee will be reimbursed based on the lowest regional registration fee (i.e. early registration). This officer will be expected to pay her registration in advance and submit proof of attendance and a copy of the paid registration to the Region Director for reimbursement consideration. All reimbursements will be made 10 days after submission.
- The expenses of the International Grand Basileus (registration, accommodation and all ground transportation) shall be paid by the Region. Other board members, national elected officers from the Region, marshals, and administrative staff will receive gratis or discounted registration and room stay in accordance with the adopted meeting budget.

Atlantic Region Executive Board Meeting

- Grammateus, Anti-Grammateus, Tamias, Tamias Grammateus and the Phylacter, will receive gratis and or discounted registration for the Executive Board Meeting, contingent upon availability of funds.
- Grammateus, Anti-Grammateus, Tamias, Tamias Grammateus and the Phylacter, 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.
- The expenses of the International Grand Basileus (registration, accommodation and all ground transportation) shall be paid by the Region. Other board members, national elected officers from the Region, marshals, and administrative staff will receive gratis or discounted registration and room stay in accordance with the adopted meeting budget.

Grand Boulé

- The expenses of the Atlantic Regional Director not covered by that National office shall be paid by the Region.
- The Atlantic Region Representative to the National Nominating Committee will be reimbursed based on the lowest national registration fee (i.e. early registration). This officer will be expected to pay her registration in advance and submit a copy of the paid registration to the Region Director for reimbursement. Reimbursement will be made 10 days after submission.

Record 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 are 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	Estimates, projections: 7
Accounts receivable: 10	Financial statements, periodic: P
Accounts receivable ledger: 10	General journal supporting papers: P
Balance sheets: 5	Trial balance, accounts receivable: 3
Bank deposit records: 6	Cash receipts, disbursement records: 10
Bank reconciliation papers: 8	Check register: 10
Bank statements: 8	Checks, expense: 10
Bills collectible: 7	Correspondence, credit & collection: 7
Bill stubs: 7	Entertainment, gifts and gratuities: 3
Budget work sheets: 3	General journal: P
Check records: 7	General ledger: P
Checks paid and canceled: 9	Petty cash records: 3
Checks voucher: 6	Profit and loss statements: P
Correspondence, accounting: 5	Traveling auditor reports: 15
Donations: 7	Trial balance sheets: P

Work papers, rough: 2

Administrative-----

Audit reports, internal: 10	Correspondence, general: 3
Audit reports, public and government: P	Organized charts: P
Audit work papers, internal: 6	Chapter membership: P
Correspondence, accounting: 5	Correspondence, purchase: 5
Correspondence, advertising: 3	Correspondence, tax: 15
Correspondence, credit & collection: 7	

Advertising-----

Activity reports, media schedules: 5
Contracts: 6 yrs. after termination
Correspondence: 5
Drawings & artwork: P
Estimates: 2
Market data and surveys: 5
Samples, displays, labels, etc.: P
Tear sheets: 3

Corporate-----

Annual reports: P	Election records, corporate: 10
Charters, constitution, by-laws and amendments: P	Incorporation records and certificates: P
Election ballots: 20	Permits to do business: P

Executive-----

Correspondence: 2
Policy statements, directives: P
Projects, notes: P
Research reports: 20
Speeches, publications: 10

Legal-----

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

-----Atlantic-----

Purchasing-----

Acknowledgments: 3
Bids, awards: 3
Contracts: 6 yrs. after termination
Correspondence: 5

Orders: 7
Purchase orders: 3
Vendors' contracts: P

Sales and Marketing-----

Complaints: 5
Invoices received: 7
Market research: P
Orders acknowledgment: 4
Price lists: P
Tax-exempt sales: 5
Correspondence: 1
Invoices, copies: 6
Mailing & prospect lists: 2
Market surveys: 5
Orders filled: 8
Shipping notices and reports: 4

Taxation-----

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

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

Marketing and Branding Procedures

The policies and procedures listed in this section are designed to assist the Atlantic Region of Zeta Phi Beta Sorority, Inc. achieve print, graphic media photography, web content, social media and event initiatives that bring consistency and greater visibility to the Sorority's marketing and communication efforts. The National Style Guide is incorporated by reference.

Introduction

The policies and procedures listed in this section are designed to assist Atlantic Region chapters of Zeta Phi Beta Sorority, Inc. achieve print, graphic media photography, web content, social media and event initiatives that bring consistency and greater visibility to the Sorority's marketing and communication efforts.

The policies and procedures listed in this manual are designed to assist Atlantic Region 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.

- Please refer to the Zeta Phi Beta Sorority National Style Guide for the correct usage of the shield.
- At the end of each e-mail correspondence that is sent on behalf of Zeta Phi Beta, 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 Atlantic Region Zeta Phi Beta style guide.
- If a chapter within Atlantic Region 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 an Atlantic Region 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 Basileus and the Director of Marketing and Public Relations must approve all messaging before it is shared.
- Protocol dictates that the International President, Regional Director, State Director and Chapter President is listed on all communications.

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 Atlantic Region 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.

- 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 Atlantic Region 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 the Atlantic Region that have a social media presence engage and share information with other chapters within the Region and beyond in order to help promote sisterhood.

Chapter Events

It is strongly encouraged that chapters within Atlantic Region 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  should be the most prevalent logo presented at the event.
- Sorority secondary seals, shields, or other representations should not be commingled with any other organizations logos, shields or other representations. Zeta Phi Beta Sorority, Inc. is a sole entity and branding should reflect this.
- Flyers for chapter events should be shared with a member of the Marketing and Public Relations Committee so that the Regional's 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

This guide was created to provide a uniform guideline for all chapters within the Atlantic Region to adhere to when designing and/or editing a new website and/or sending out emails under the purview of Zeta Phi Beta Sorority, Inc. This is an abbreviated document and a detailed document is being developed by the National Publications team and will be available upon release.

Introduction

This document has been written to create a uniform guideline for all chapters within the Atlantic Region 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 Region.
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 and community leader sorors and Amicae 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 - YOU MUST:

- Register the web address with the International Website Development Team of the Sorority by sending an email to webteam@zphib1920.org;
- Comply with university/college policies (if applicable);

- Comply with NPHC rules and all applicable federal, Region, provincial, and local laws;
- Include a contact email address for website visitors to submit comments, suggestions, complaints, and questions;
- 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. Region, state and local 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://Atlantic.zhib\[chapter_name\].org](http://Atlantic.zhib[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 on the site.
- **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, including pictures
- Past National Presidents (only if Soror(s) initiated through that particular chapter or photographed with the chapter)
- Chapter officers
- Region, 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.). (Remember this is different than contracts where you must name the specific entity before the sorority's name.)

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 ZFBS)

ALWAYS REMEMBER:

Anything that is posted on the Internet is accessible anywhere 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):

- **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.
- **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 Atlantic Region Webmistress.

Electronic Meetings and Communications

SECTION 1. **Meetings** – The Executive Committee, Executive Board and all committees and subcommittees shall be authorized to meet by telephone conference or through other electronic communications media so long as all the members can simultaneously hear each other and participate during the meeting.

SECTION 2 **Communication** – Unless members indicate otherwise to the Executive Committee and the Executive Board, all communication required in the Atlantic Region Bylaws and the Standard Operating Procedure (SOP), including meeting notices, may be sent electronically.

Charter/Chapter Reactivation Procedures

Charters are processed in accordance with the National Constitution and Bylaws as well as the National Handbook. These guidelines were created to ensure newly chartered and reactivated chapters have a solid chance to flourish and grow to their expected potential through standardizing the startup procedures for members to follow within their first two years of existence.

Charter/Reactivation Process

Sorors interested in chartering or reactivating a chapter after a period of five years or more will be responsible for developing a strategic plan to include short term/long term goals. The Plan should include the following components that 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

The Atlantic Region Director will assign a mentor to work with the members.

Phase Two – Second 3 months

- Mentor will work with the members to develop chapter 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 approval for new charter or reactivation is made the newly chartered chapter will 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 Region Director for approval.

Mentor will follow up with the newly chartered 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 Regional Director on the progress of the chapter.
- Mentor should attend the first three meetings 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 Regional 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 Regional Director for consideration.

Protocol Procedures

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

Atlantic Region 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 the Region 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. The National Protocol Manual is incorporated by reference.

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, and the Regional 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. ..." or as "Soror...", 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 a 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 elected, Regional appointed officers visiting a chapter, except when she chooses to delegate the responsibility. The order should always be:

- **National:** International Grand Basileus, Past Grand Basilei, Regional Director, National elected officers, National appointed officers, local graduate/undergraduate Basilei, elected officers and appointed officers.
- **Regional:** Regional Director, Past Regional Directors, State Director, National and Regional elected officers, appointed officers.
- **State:** State Director, Past State Directors, National, Regional and State elected officers, appointed officers
- **Local:** Chapter Basileus, Past Basilei, National, Regional, State and elected local officers, appointed local officers.

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 the Atlantic Region should be introduced by the Atlantic Region Director except when she chooses to delegate the responsibility.

The Atlantic Regional Director is the first lady of the Regional, its highest-ranking officer, and the administrator of all Atlantic Region 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 Atlantic Region Director when she visits a chapter or chapter sponsored events, except when she is unable to do so and has delegated that responsibility. Courtesies that should be extended are as follows:

- Chapter/Region Representative should meet the Region 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.
- Sightseeing 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 greet the entire assemblage on all programs and be recognized by the body.
- A personal escort should be provided to and from all functions.

Note: If the Regional Director is the official guest of the State or Chapter, specific amenities should be provided as listed above. Amenities are always provided to her at the Regional Leadership Conference and the Regional Executive Board Meeting as the presiding officer for those two events.

Regional Conferences/Meetings

Registration

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

Housing

The Grand Basileus, past Grand Basilei of the region, invited Past Grand Basilei outside of the region, the Regional Director, and invited 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.). Escorts of the dignitaries are not seated at the reserved table with the dignitary that they are escorting with the exception of the International Grand Basileus' escort.

Courtesies should be extended as requested by the Region Director and/or Executive Board of the Atlantic Region.

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.

For the Atlantic Region Leadership Conference or the Atlantic Region Executive Board Meeting, the Eastern Regional Director of Phi Beta Sigma Fraternity, Inc. shall be invited to greet the assembly and afforded complimentary registration and accommodation if the budget allows. He shall be seated in a position of honor.

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 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): 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 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 (with the exception of an orchid corsage for the International Grand Basileus)

Amica: 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.
- Induction Ceremony of the Membership Intake Process (MIP).
- Ceremony for organizing a chapter.

Black is mandatory at:

- Burial service for a soror.

Wear royal blue/white at:

- Zeta functions
- Sigma functions
- Any other time when representing Zeta Phi Beta Sorority, Incorporated

Atlantic Region Leadership Conference

Section 1: Region Responsibilities

1. The Region is responsible for the following:
 - a) Meal programs and other printed materials.
 - b) Meals.
 - c) Conference banners.
 - d) Gifts and awards to be presented by the Region.
 - e) All transportation of conference registrants between conference activities.
2. The Region owns all income earnings and losses from vending activities.

Section 2: Regional Director Responsibilities

1. Accommodations
 - a) The Regional Director is responsible for final negotiations and signature for the hotel, conference site and all conference related contracts and agreements.
 - b) Only the Regional Director is authorized to incur debts on behalf of the Region.
2. The Regional Director is responsible for providing the following pages for the souvenir journal (if applicable):
 - a) Executive Board.
 - b) Agendas.
 - c) Meal Programs.
 - d) List of Chapters and Auxiliaries.
 - e) Workshop Overview.
3. Vendors
 - a) The Regional Director is responsible for securing contracts for suitable vendors.
 - b) The Regional Director determines the vendor fees.

Section 3: Support Chapter Responsibilities

The Support Chapter may have a designated Planning Committee to fulfill the following responsibilities

1. Accommodations—if no Meeting Planner is engaged
 - a. The Support Chapter is responsible for securing a minimum of three hotel and conference site proposals to be presented to the Regional Director for final contract negotiation and approval.
2. Hospitality and Protocol
 - a. The Support Chapter is responsible for extending courtesies to National and Regional Officers.
 - b. Fruit baskets or flowers are to be placed in the rooms of the International Grand Basileus and the Regional Director.
 - c. In conjunction with the Regional Protocol Coordinator, ensure the International Grand Basileus, and Regional Director are escorted.
 - d. Provide corsages (white rose is the official flower) for: International Grand Basileus (orchid), Regional Director, Past Regional Directors and State Directors.
3. Souvenir Journal
 - a. The Support Chapter is responsible for procuring the letters of greetings from the community and political leaders and dignitaries.
4. Registration
 - a. The Support Chapter coordinates the check-in and registration of all registrants at the direction of the Tamias Grammateus and the Registrar, distribution of registration materials

and ensures all Sorority and Auxiliary potentates receive registration materials in conjunction with the Protocol Committee.

5. Decorations and Signage
 - a. The Support Chapter is responsible for assisting with:
 - i. All necessary decorations for conference, which includes:
 1. Flowers for the head table during the official opening and the luncheon.
 2. Table decorations and center pieces for the luncheon.
 - ii. Directional signs inside the conference site.
6. Meals, Business Sessions and Programs
 - a. The Support Chapter ensures tickets are collected or badges are checked prior to allowing entrance into all events where meals are served. Only registrants and potentates on the dais are to be admitted.
 - b. The Support Chapter ensures registrants are seated in proper places during the luncheon especially at the head table and reserved tables. Make sure the hotel room is set-up in the prescribed fashion with audio-visual equipment, piano, etc.
7. Conference Bags and Kit
8. Workshop
 - a. The Support Chapter ensures the speakers or consultants are in place as well as act as recorders and facilitators.
 - b. The Support Chapter ensures the consultants have the necessary equipment needed for the presentations.
9. Transportation
 - a. The Support Chapter is responsible for ensuring transportation for the International Grand Basileus and Regional Director to and from the airport if needed.
 - b. The Support Chapter shall provide information and directional assistance to Sorority and Auxiliary members when requested.
10. Publicity
 - a. Submit an article to the newspaper before the conference and after the conference.
 - b. Contact mayor or other government officials for greetings during the opening session or luncheon.
 - c. Contact and secure services of a photographer.
 - d. Make certain the banner with the theme is available.
11. Clerical
 - a. Responsible for typing information or communications concerning the conference.
 - b. Prepare aye and nay cards for voting delegates when requested by the Regional Director or the elected officers.
 - c. Prepare signs designating life members' and delegates.

Section 4: Regional Marshal Responsibilities

The Regional Marshal is the scheduling coordinator who oversees all Support Chapter Committees. She is the liaison between the Support Chapter and the Regional Director to ensure that the vision of the Regional Director is fulfilled for the conference and/or board meeting. See Marshal duties.

Zeta Phi Beta Sorority, Inc.
Atlantic Regional Executive Board Meeting

Escort Responsibilities

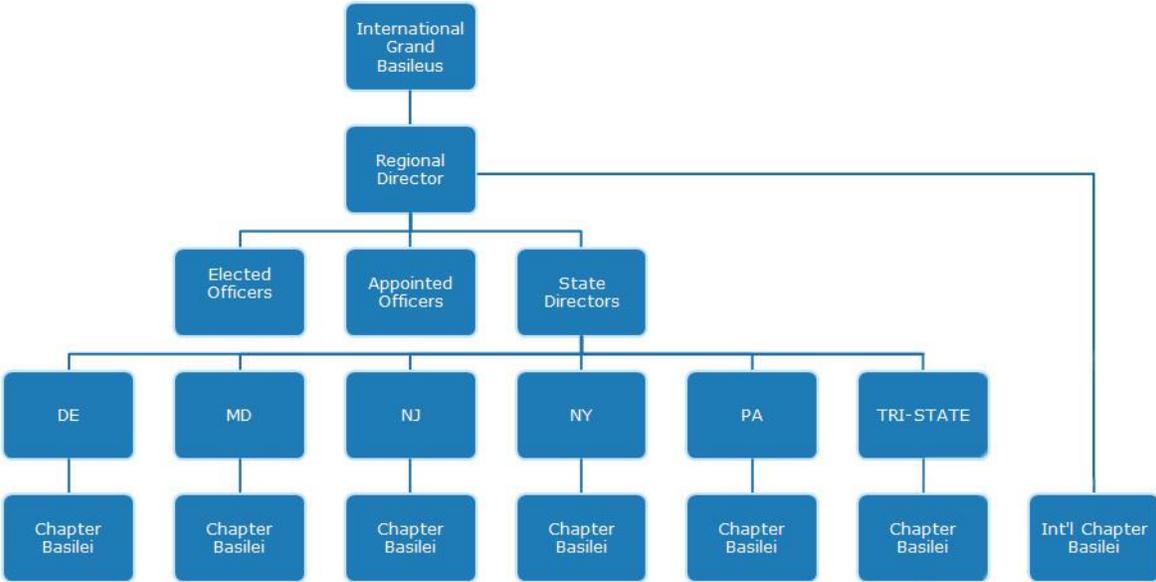
Thank you for agreeing to be an escort for the Executive Board Meeting. Below is a list of expected duties and responsibilities. Please be mindful that the list is subject to change as necessary.

- Please dress in business attire and wear professional looking, comfortable shoes.
- Please greet your principal on the first day of the meeting to introduce yourself and to go over her schedule for the weekend.
- Please be sure to find out if your principal has any special dietary needs as sometimes this can be overlooked by the waiters/waitresses.
- For meal functions, please ensure that the dignitary is seated at the appropriate table. Once you have seated the dignitary, be seated at a non-dignitary table.
- Please be **prompt and on time** when you are to meet with your principal.
- At no time should an escort spend personal monies on your assigned dignitary. If someone asks you to do this, please let the Protocol Coordinator know immediately.
- Please find out preferences of the dignitary, i.e., does she require a wake up call; does she plan on attending breakfast/lunch.
- As an escort, you have the responsibility of making sure your dignitary is on time to the meeting.
- Call before you go up to anyone's room. Please knock once you arrive and advise that you will be waiting outside of the room until they are ready. Understand that a hotel room does not provide the necessary privacy for the dignitary to complete dressing so please wait outside
- Confirm the night before with the dignitary
- Confirm where the person is to go.
- Check with your dignitary periodically to make sure they are comfortable and do not need anything during the meeting.
- Escorts should minimize the number of items you, yourself will carry because as an escort, you will have to carry items for the person you are escorting. Should your principal receive any gifts and/or amenities, please discreetly retrieve gifts to allow for continued interaction with Sorors.
- It is proper to take initiative by asking the dignitary if they would like for you to carry their items.
- As an escort, you will sometimes have to help the person navigate through the crowd, the function, or event. For example, your designee may be tired and want to go to the room. Don't be rude, but help them gracefully make an exit to that place. Be sure to never interrupt the person while they are talking.
- **Remember, you were chosen to be an escort. Your friend or another Soror cannot stand in as an escort for you.**

Thank you again for agreeing to be an escort. If you have any questions or concerns, please contact the Protocol Coordinator directly.

ATLANTIC REGION ORGANIZATION CHART

Reporting



APPENDIX

**ZETA PHI BETA SORORITY, INC
ATLANTIC REGION
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)).							
	YES	NO	YOUTH		# ADVISORS	# VOLUNTEERS	
			# Of members	DUES/M TG		MALES	FEMALES
Pearlettes							
Amicettes							
Archonettes							
A. 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___

Model Chapter/Auxiliary Report

CRITERIA AND GUIDELINES

Chapter/Auxiliary Report

All active and financial chapters/auxiliaries within the Atlantic Region are strongly encouraged to participate in the yyyy REGIONAL MODEL CHAPTER/AUXILIARY PROGRAM during the xx Atlantic Regional Leadership Conference. We know your chapter/auxiliary has had stellar programs and exemplified the principles of our great sorority in the most awesome way. We cannot wait to see what you have accomplished! Remember, this is not the Scrapbook competition; however, we encourage you to enter that as well. All materials for this competition must be typed, double spaced and bound together in report form. Pretend you are presenting your annual report to investors and stockholders.

Preparing your report

Preparing your chapter or auxiliary's report should be a fun time for reflection and embellishment for your members. This report should not be a chore or burden for one person. The committee encourages creativity in organizing your report. The preparation of the report can be simple by encouraging chapter chairpersons to write their respective sections and submit them to the chapter report "coordinator." The information below may be used as a basic guide when preparing your report; however, you are encouraged to dig deep, be detailed, and show your creativity through your presentation. Identification and record of the size of your chapter is necessary to compare and categorize those chapters that differ in the size of membership.

(See "How will my chapter's/auxiliary's report be judged and/or graded?")

1. All reports must have the chapter's name and/or auxiliary information for identification purposes and be labeled Atlantic Region Model Chapter or Auxiliary Report yyyy-yyyy and/or yyyy-yyyy. Cover sheets must be submitted with reports.
2. All reports must outline and incorporate the following: Zeta Principles, National Programs, National Observances, the International Grand Basileus' National Programmatic Thrust, the Regional Director's Programmatic and Organizational Focus, Conferences, Awards and Honors, Greek Unity and Collaboration, sponsorship of Undergraduate Chapters and Auxiliaries (Graduate Chapters only), Campus activities (Undergraduate Chapters only), Community activities, collaboration and coordination with other Greek auxiliaries, youth groups and community organizations (Amicae only). In addition, all reports will be judged on organization, grammar, originality/creativity, and overall presentation. BE CREATIVE!!!
3. Supporting documents (thank you letters, letters of appreciation, programs, flyers, marketing and advertisement materials) for any chapter and/or auxiliary (co) sponsored activities are strongly encouraged to accompany your report.
4. Reports should be organized in an orderly and neat fashion. A table of contents is always helpful and allows information to be found more easily.
5. All reports must be typed.

Submitting your report

Must be submitted electronically to your State Director by mm/dd/yyyy.

Who are the judges?

No later than mm/dd/yyyy, State Directors are asked to submit names and contact information of no more than two (2) Sorors (graduate and/or undergraduate) and one (1) Amica to serve on the committee. Names can be submitted from State Directors to Atlantic Region Chief of Staff at email _____. To ensure fairness, only two Sorors and one Amica per state will be permitted to judge and will be accepted on a first come, first serve basis from the State Director. The Chief of Staff will serve as the facilitator only, coordinating the process and not holding a vote during the review of reports.

CRITERIA AND GUIDELINES

How will my chapter's report be judged and/or graded?

Each submitted report would be evaluated no more than three (3) times by committee members.

Committee members are not allowed to judge/grade their own chapter's reports from their respective states. The judges will evaluate the chapter reports using the following grading procedures. Total possible points: 200 points. Please separate fiscal years. Each chapter or auxiliary report should be for mm/yyyy – mm/yyyy and a separate report for mm/yyyy-mm/yyyy.

Grading category	Possible points
Organization and Overall Presentation (includes grammar, creativity and judge's Perception)	50
Exemplifying Zeta's Principles	20
National Programs	20
National Observances	20
International Grand Basileus Programmatic Thrusts	10
Regional Director Programmatic and Organizational Focus	10
Conferences	10
Awards/Honors/Recognitions on all levels	10
Greek Unity (Graduate and Undergraduate Chapters only)	10
Sponsorship of Undergraduate and/or Auxiliaries (Graduate Chapters only)	10
Campus Activities (Undergraduate Chapters only)	10
Collaboration and coordination with other Greek auxiliaries, youth groups, schools and community organizations (Amicae and Youth Auxiliaries only)	10
BONUS POINTS – any unique, stellar extraordinary events sponsored	10

Award Categories –

*Chapters with 26 and above members
(Graduate and Undergraduate awarded separately)

*Chapters with 10 – 25 members
(Graduate and Undergraduate awarded separately)

*Chapters with less than 10 members
(Graduate and Undergraduate awarded separately)

Amicae (only)

Deadlines and Timelines

mm/dd/yyyy

State Directors will submit names of three (3) judges for the judging committee. Names are to be submitted to Chief of Staff e-mail _____.

mm/dd/yyyy

Committee will judge Chapter Reports.

mm/yyyy

Winners will be announced during the Awards Banquet at the Atlantic Regional Leadership Conference.

COVER SHEET

Chapter/Auxiliary Name

Institution Name (if applicable)

Chapter Address

City

State

Zip

Sponsoring Chapter (if applicable)

Submitted by

Date

Contact information (include cell Phone)

Please check the appropriate category below:

Graduate Chapters only:

- Graduate chapter less than 10 members
- Graduate chapter 10 – 25 members
- Graduate chapter 26+ members

Undergraduate Chapters only:

- Undergraduate chapter less than 10 members
- Undergraduate 10 – 25 members
- Undergraduate chapter 26+ members

Amica auxiliaries only:

- Amica auxiliary less than 10 members
- Amica auxiliary 10 – 25 members
- Amica auxiliary 26+ members

For committee use only:

Date: _____ Received by : _____ Chapter:

Location received: _____ Time received:

CHAPTER DATA

General Chapter Information

1. In yyyy – yyyy did your chapter celebrate a milestone anniversary, i.e. 5th, 10th, 80th, 85th?
If so, what anniversary? _____ Date of charter: _____

2. In yyyy-yyyy, did your chapter celebrate a milestone anniversary, i.e. 5th, 10th, 80th, 85th? If so, what anniversary? _____ Date of charter: _____

3. Chapter Sponsorship (Graduate Zeta only)
Do you sponsor an Amica auxiliary? If so, name.

4. Do you sponsor an Undergraduate Chapter? If so, name the chapter and location.

5. Were the chapter(s) financial for yyyy-yyyy; yyyy-yyyy If not, why? Name the advisor(s).

6. How many from your chapter/auxiliary were in attendance at the following events:
xx Atlantic Regional Leadership Conference - _____ Sorors
_____ Amicae

Boulé xxxx - _____ Sorors _____ Amicae

Xxxx Regional Executive Board meeting - _____ Sorors _____ Amicae

7. Do you sponsor youth auxiliaries? If so, list the numbers below.

Number of Archonettes: _____

Number of Amicettes: _____

Number of Pearlettes: _____

8. Campaign Support: Did the chapter support the Capital Campaign? If so, what was the Total Amount Given: _____

yyyy-yyyy Chapter Amount: _____ yyyy-yyyy Chapter Amount: _____

yyyy-yyyy Individual Amount: _____ yyyy-yyyy Individual Amount: _____

9. Did the chapter support the National Educational Foundation? If so, what was the Total Amount Given: _____

yyyy-yyyy Chapter Amount: _____ yyyy-yyyy Chapter Amount: _____

yyyy-yyyy Individual Amount: _____ yyyy-yyyy Individual Amount: _____

10. Did the chapter support March for Babies?

If so, what was the Total Amount Given: _____

Number of Members Participating: _____

11. Did the chapter support the Finer Women Don't Haze fundraiser? If so, how much in donations were collected?

t-shirts were purchased _____: How many donations were collected

12. Did the chapter support the yyyy Regional Elder Care Project? If so, what is the amount donated _____

13. Does the chapter have a Stork's Nest? If so, list the location; years of operation; days/hour of operation; Coordinator Contact information

14. Did the chapter submit photographs for the Atlantic Region History Book? Yes/No

15. Submissions of photographs are greatly needed.

Please submit photos of the chapter performing community service from mm/yyyy through mm/yyyy by mm/dd/yyyy to zbbpictures@gmail.com with a copy to your State Director. All photos must indicate the chapter name, location, state, individuals and year if possible.

16. **Graduation Photos.** Please submit photos of the graduate in cap and gown by mm/dd/yyyy to zbbpictures@gmail.com with copy to your State Director. All photos must indicate the graduate's name, chapter name location, state, degree and date. This includes graduates from undergraduate, graduate or professional school. Type of photos:

Individual shot of the graduating soror in her cap and gown. Group shot that includes the graduating soror in her cap and gown.

Instructions

Thank you for submitting Zeta Phi Beta Sorority, Inc.'s Atlantic Region Chapter Financial Reporting Form. Below please find instructions to assist you in the successful completion of the form.

Section I. Chapter Contact Information

Date	Insert today's date
Chapter	Insert the chapter's name
College/University	This section should be completed by Undergraduate Chapter's only. Indicate the College/University where your chapter is located
Address	Physical address or PO Box where your chapter receives mail
City	City where your chapter is located
State	Please select from the drop down menu the applicable state where your chapter is located
Zip Code	Zip code where your chapter is located
Basileus	Insert the name of your current chapter Basileus
Chapter Phone Number Including Area Code	Insert the chapter's official phone number. If the chapter does not have a phone number, please insert the phone number of the Soror who prepared the report.
Chapter's Email Address	Insert the chapter's official email address.

Section II. Chapter Contact Information

Chapter Status	Select either Undergraduate or Graduate from the drop down menu.
Type of Report	Initial should be selected if this is the first report that your chapter is submitting. Select Supplemental report from the drop down menu if your chapter has already submitted an initial report. Select New Member from the drop down menu if your chapter is conducting intake on new members
Sponsoring Graduate Chapter	This section should be completed by undergraduates only. List your sponsoring graduate chapter
Report Prepared By	Please insert the name of the Soror who is preparing the report for submission
Chapter Office/Title	Please insert the office held or title of the Soror who is preparing the report for submission
Email Address of Preparer	Please insert the email address of the Soror who is preparing the report submission
Check/MO #	Enter the Check/Money Order # of the payment submitted
Total Undergraduate Fee to be Submitted	DO NOT INPUT ANY INFORMATION IN THIS SECTION AS IT WILL AUTOPOPULATE ONCE THE FORM IS COMPLETED.
Total Graduate Fee	

to be Submitted	DO NOT INPUT ANY INFORMATION IN THIS SECTION AS IT WILL AUTOPOPULATE ONCE THE FORM IS COMPLETED.
Grand Total Fee to be Submitted	Please ensure that your payment is equal to this amount.
Section III. Chapter Members	
Last Name and First Name	Please insert the last and first name as listed at IHQ of the financial Soror who you received payment. If additional space is needed, please add another excel spreadsheet and ensure that you capture each Sorors Last Name, First Name, Membership ID, Membership Status, and Email Address
Membership ID. NO.	Please insert the respective membership number of the financial Soror. Leave blank only if you are submitting payment for new members.
Membership Status	Please select one of the following from the drop down menu Graduate- Regular Graduate Member Undergraduate- Regular Undergraduate Member Associate Member- A Graduate Soror who is an associate member of an undergraduate chapter must pay Graduate per capita fees and be listed as an Associate Member An Undergraduate Soror of a Graduate Chapter may pay undergraduate per capita tax for no longer than five years. Transfer Member- A Soror who has an official signed transfer card from her previous chapter and presents it to her new chapter. A transfer Soror is required to pay her Atlantic Region dues only once in the current sorority year despite if she transfers to another Atlantic Region chapter in the same year. Reclaim- A Soror who has been unfinancial with any chapter for two years or more. Life Member- Soror who has obtained approved Life Membership status New Member- A new member is one in which your chapter has received approval from the National First Anti-Basileus
Email Address	Please insert the email address for each respective Soror.
Section IV. Undergraduate Fees	
	This section should be completed by undergraduate chapters
Chapter Tax	The Undergraduate chapter Tax is \$20 per chapter. Please enter \$20 in cell A 58 on the Financial Reporting Form Sheet.
Per Capita Tax	Per Capita Tax is \$15 per member. Please enter \$15 on cell B 58 on the Financial Reporting Form sheet. Only select ONE type of Membership per Soror.
Late Fee Per Chapter	Chapter Tax/Regional Assessments must be received by October 31st of every year or a \$15 late fee will be assessed per chapter. All payments received after October 31st will be assessed a late fee.
Scholarship (Even Year)	Scholarship fee is \$25 per chapter year and should only be paid during even years. For example, the next five even years are as follows: 2014-2015, 2016-2017, 2018-2019, 2020-2021, 2022-2023 If it is an even sorority year, please enter \$25 in cell D58 on the Financial Reporting Form Sheet
No. of Members	Please include the total number of Regular, Transfer, Life, , Reclaimed, and Associate Sorors accordingly. Only select ONE type of Membership per Soror. All payments received after October 31st will be assessed a late fee.
No. of New Members	Complete this section when your chapter is initiating new members. The section should include the number of new members that the National First Anti-Basileus has approved A \$15 fee is charged for each new member.
Section V. Graduate Fees	
	This section should be completed by graduate chapters
Chapter Tax	The Graduate chapter Tax is \$50 per chapter.
Per Capita Tax	Per Capita Tax is \$20 per member. Please enter \$20 on cell B 65 on the Financial Reporting Form sheet.
Late Fee Per Chapter	

Chapter Tax/Regional Assessments must be received by October 31st of every year or a \$15 late fee will be assessed per chapter. All payments received after October 31st will be assessed a late fee.

Scholarship (Even Year)

The Scholarship fee is \$100 per chapter year and should only be paid during even years. For example, the next five even years are as follows: 2014-2015, 2016-2017, 2018-2019, 2020-2021, 2022-2023. If it is an even sorority year, please enter \$100 in cell D65 on the Financial Reporting Form Sheet.

No. of Members

Please include the total number of Regular, Transfer, Life, Reclaimed, and Associate Sorors accordingly. Only select **ONE** type of Membership per Soror. All payments received after October 31st will be assessed a late fee.

No. of New Members

Complete this section when your chapter is initiating new members. The section should include the number of new members that the National First Anti-Basileus has approved. A \$15 fee is charged for each new member.

Five Easy Steps for the Successful Submission of the Chapter Financial Reporting Form

1. Print out THREE copies of your completed Chapter Financial Reporting Form. DO NOT MAIL THE INSTRUCTION SHEET.
2. Submit a Certified Check, Cashier's Check, or Money Order payable to: Zeta Phi Beta Sorority, Inc.- Atlantic Region
3. Mail three copies of the completed chapter financial reporting form and payment to Soror Crystal Johnson * Zeta Phi Beta Sorority, Inc. * Atlantic Region Tamias Grammateus* 2152 Ralph Avenue* Suite 242 * Brooklyn, NY 11234
4. Save the form using the following format: "Chapter Name_State_2014_2015_AR Financial Reporting Form". For example: "Sigma Kappa Zeta_NY_2014_2015 AR Financial Reporting Form"
5. Email the form to AtlanticRegTamGram@gmail.com using the following subject Line "Chapter Name_State_2014_2015_AR Financial Reporting Form". For example: "Sigma Kappa Zeta_NY_2013_2014 AR Financial Reporting Form"

Section IV. Undergraduate Fees (Chapter Tax is \$20, Per Capita is \$15 Per Soror, Late Fee is \$15 per chapter, and Scholarship During an EVEN YEAR is \$25 per year)					
Chapter Tax	Per Capita Tax	Late Fee Per Chapter	Scholarship (EVEN Year)	No. of Regular Members	Total Undergraduate Members
					0
No. of Transfer Members	No. of Life Members	No. of Reclaimed Members	No. of Associate Members	No. of New Members	Total Fees to be Submitted
					\$0.00
Section V. Graduate Fees (Chapter Tax is \$50, Per Capita is \$20 Per Soror, Late Fee is \$15 per chapter, and Scholarship During an EVEN YEAR is \$100 per year)					
Chapter Tax	Per Capita Tax	Late Fee Per Chapter	Scholarship (EVEN Year)	No. of Regular Members	Total Graduate Members
					0
No. of Transfer Members	No. of Life Members	No. of Reclaimed Members	No. of Associate Members	No. of New Members	Total Fees to be Submitted
					\$0.00
DO NOT ENTER DATA BELOW THIS LINE					
Date Received		Return Receipt Emailed		Receipt No.	
Date Mailed To Tamias				Check/MO #	

Regional Chapter Assessments

RECEIPT

Please Keep for Your Records

Monies Received
from

[Name]

[Chapter Name or Company, if applicable]

[Street Address]

[City, ST ZIP Code]

[Phone]

[Email]

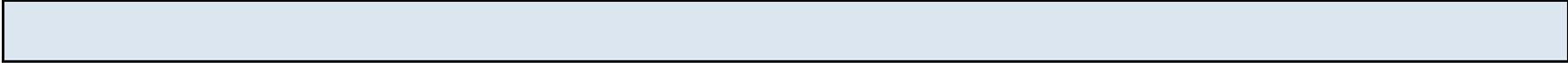
Sponsoring Graduate Chapter

Sponsoring Graduate Chapter Email Address

Receipt No:	1920-0001
Reporting Period:	2014-2015
Date Received	10/31/2014
Date Receipt Emailed to Chapter & Sponsoring Grad Chapter	11/3/2014
# of Member(s) Payment Submitted	0
# Associate Member(s) Payments Submitted	0
# of Life Member(s) Payment Submitted	0
# Reclaimed Member(s) Payment Submitted	0
New Member(s) Payment Submitted	0
# of Transfer Member(s) Payment Submitted	0

Report Type	Payment Method	Check or Money Order No.
Initial	Personal Check	

Description	Graduate Chapter Tax	Graduate Per Capita	Graduate Scholarship	Late Fee	Regional Constitution & Bylaws	Credit for Overpayment of [XXXXXX]	Total
Graduate Chapter Assessment Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	\$0.00
Monies Received Grand Total	<i>Thank you for your submission! Please note that the date monies were received will determine when it will be forwarded to the Tamias on either the 2nd or 4th Saturday of the month.</i>						\$0.00



**Returned check
Insufficient Funds**

Atlantic Region Tamias Grammateus

Address:

Phone:

Email:

Date

Name of Tamias

Zeta Phi Beta Sorority, Inc. – Name of Chapter

P.O. Box

City, State, Zip

Dear Soror,

This letter is to kindly notify you that the Atlantic Region received a return on the check issued for payment toward your chapter's regional assessment. The chapter check # _____ payable to Zeta Phi Beta Sorority, Inc. – Atlantic Region in the amount of \$ _____ was returned due to insufficient funds.

Upon reissuing of payment, I ask that the amount of \$ ____ be paid by a certified check or money order, plus the \$ ____ fee for the bank's service charge due to the returned check.

Should you have any questions, please do not hesitate to contact me via email or telephone listed above.

Sisterly yours,

Soror

Zeta Phi Beta Sorority, Inc.

Atlantic Regional Tamias Grammateus

cc: Atlantic Regional Director, Atlantic Regional Tamias

Budget to Actuals

Zeta Phi Beta Sorority, Incorporated Atlantic Region	Jul 1, YR - Jun. 30, YR+2	Jul. 1, YR - Current Qtr Month End & Year	VARIANCE	July 1, 2014 - Jun. 30, 2016
Fiscal Year YR - YR+2 Budget to Actuals YR+2 - YR+4 Proposed Budget	PROJECTED	ACTUAL	favorable (unfavorable)	PROPOSED BUDGET
REVENUES				
Operational Income: Assessments, registrations, reimbursements				
Fundraising Income: Regional Fundraiser				
Bank Discrepancy - favorable/(unfavorable)				
TOTAL REVENUE	\$0.00	\$0.00	\$0.00	\$0.00
	APPROVED BUDGET	ACTUAL	VARIANCE	PROPOSED BUDGET
			favorable (unfavorable)	
EXPENSES				
REGIONAL DIRECTOR				
Telephone				

Travel				
Accommodations/Meals				
Registration and Region Representations				
Gifts/Reciprocity				
Postage				
Office Supplies				
Clerical Services				
Miscellaneous				
SUB TOTALS	\$0.00	\$0.00	\$0.00	\$0.00
STATE DIRECTORS & ELECTED OFFICERS				
State Directors				
Elected Officer Travel and Training				
Appointed Officers Travel and Training				
SUB TOTALS	\$0.00	\$0.00	\$0.00	\$0.00
REGIONAL DOCUMENTS				
Journal Ads				

Stationary				
Website Fees/ Maintenance				
Newsletter				
SUB TOTALS	\$0.00	\$0.00	\$0.00	\$0.00
Zeta Phi Beta Sorority, Incorporated Atlantic Region	Jul 1, YR - Jun. 30, YR+2	Jul. 1, YR - Current Qtr Month End & Year	VARIANCE	July 1, 2014 - Jun. 30, 2016
Fiscal Year YR - YR+2 Budget to Actuals YR+2 - YR+4 Proposed Budget	PROJECTED	ACTUAL	favorable (unfavorable)	PROPOSED BUDGET
NATIONAL PARTICIPATION				
Regional Endorsed Candidates				
Transportation & Accommodations				
Gift for the Grand Basileus				
Boulé/ZOL Registration & Misc. Expenses				
Boulé/ZOL Ad				
Capital Campaign/National Projects				
SUB TOTALS	\$0.00	\$0.00	\$0.00	\$0.00

AUXILIARIES AND UNDERGRADUATES				
Undergraduate Retreat				
3rd Anti-Basileus Advisor Training				
Youth Conference/Programming				
Amicae Conference				
SUB TOTALS	\$0.00	\$0.00	\$0.00	\$0.00
REGIONAL PROGRAMS				
Charitable Contributions (NEF, Z-HOPE project, other)				
La Cheerio/Sunshine				
Regional Conference, Exec Board Meeting, other meetings				
SUB TOTALS	\$0.00	\$0.00	\$0.00	\$0.00
REGIONAL FUNDRAISER				
Fundraising expense				
Undergraduate Boulé expenses (reg., travel, accom.)				
Zeta Properties				

NEF Contribution				
Donation to States				
SUB TOTALS	\$0.00	\$0.00	\$0.00	\$0.00
MISCELLANEOUS OPERATIONAL EXPENSES				
External Auditor				
Legal				
Graphic Designer/Illustrator				
Computer Software				
Merchant Software				
Contingency				
Storage Space				
Post Office Box				
SUB TOTALS	\$0.00	\$0.00	\$0.00	\$0.00
TOTAL EXPENSES				
OPERATIONAL SURPLUS/(DEFICIT)	\$0.00	\$0.00	\$0.00	\$0.00

Budget and Finance Overview

ASSETS Checking Savings/Money Market

Total Assets

Liabilities and Equity Liabilities

Total Liabilities

Equity Opening balance equity Net Surplus

Total Equity Total Liabilities and Equity

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00 \$0.00

\$0.00 \$0.00

Current Qtr Month End/Year

Report of the Tamias

Reporting Period yyyy-yyyy

<u>January 1, yyyy – June 30, yyyy</u>	
Beginning Balance- January 1, yyyy	
<i>Income</i>	
<i>Expenses</i>	
<i>Programmatic (Programs/Meetings)</i>	
Ending Balance-June 30, yyyy	
Money Market Account	

<u>July 1, yyyy – June 30, yyyy</u>	
Beginning Balance- July 1, yyyy	
<i>Income</i>	
<i>Expenses</i>	
<i>Programmatic (Programs/Meetings)</i>	
Ending Balance- June 30, yyyy	

***Zeta Phi Beta Sorority, Inc. Atlantic Region
Year Format (yyyy-yyyy) Fiscal Year
Balance Sheet***

ASSETS

Business Checking

Assessments

Fundraising

Registrations

Reimbursements

Scholarship Savings

Total Assets

LIABILITES

Regional Director Expenses

Accommodations/Meals

Clerical Services

Gifts/Reciprocity

Miscellaneous

Office Supplies

Postage

Registration and Region Representations

Telephone

Travel

State Director and Elected Officer

State Directors

Appointed Officers

Elected Officer

La Cheerio/Sunshine Coordinator

Regional Documents

Journal Ads

Stationary

Website Fees/ Maintenance

Newsletter

National Participation

Regional Endorsed Candidates
Transportation & Accommodations
Gift for the Grand Basileus
Boulé/ZOL Expenses
National Projects

Auxiliaries and Undergraduates

Undergraduate Retreat
Youth Conference/Programming
Amicae Conference

Regional Programs

Charitable Contributions (NEF, Z-HOPE project, other)
Conferences and Meetings

Regional Fundraisers

Fundraising expense
NEF Contribution

Miscellaneous Operational Expenses

Graphic Designer/Illustrator
Computer Software
Storage Space
Post Office Box

Total Liabilities

Net Assets

Voucher and Reimbursement Process

Collaborating with the Regional Director and Tamias-Grammateus, we have finalized a more expedited process for vouchers and reimbursements. Please carefully read the criteria and processes below.

Criteria

- All expenditures must be pre-approved by the Regional Director prior to submitting a voucher.
 - Expenditures that are a part of an Officer's responsibilities are considered pre-approved, but please contact the Regional Director if you are unsure.
- All vouchers and receipts must be submitted within sixty (60) calendar days of the date printed on the receipt.
- We shall use the calculation of (total miles x 0.555) for mileage reimbursement. MapQuest directions shall be submitted with vouchers.

Process (electronic submission)

- Scan in and email a completed voucher form and all related receipts, or MapQuest directions, to the Regional Director.
- The Regional Director will print and give a physical signature of approval, rescan, and forward to the Tamias.
- Upon receipt of the signed voucher and receipts, the Tamias will mail a reimbursement check to the Regional Director for her signature.
- The Regional Director will mail the reimbursement check to the original submitter of the voucher.

Process (hard copy submission)

- Mail a copy of a completed voucher form and all related receipts, or MapQuest directions, to the Regional Director.
- The Regional Director will give a physical signature of approval and forward, via mail or electronically by scanning, to the Tamias.
- Upon receipt of the signed voucher and receipts the Tamias will mail a reimbursement check to the Regional Director for her signature.
- The Regional Director will mail the reimbursement check to the original submitter of the voucher.

Notice of Bounced Check

(Date)

(Regional Tamias' Name)
Zeta Phi Beta Sorority, Inc.
Atlantic Region Tamias
(Regional Tamias Address)
(Regional Tamias Telephone 718-555-1920)

(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 *(Region assessment, Founders Day ticket, Regional Leadership Conference, etc.)*. The check made payable to Zeta Phi Beta Sorority, Inc. - Atlantic Region 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)

CC: *Tamias Grammateus*
Regional Director

Insufficient Chapter Payment

**Zeta Phi Beta Sorority, Inc.
Atlantic Region**

Date

Dear _____ Chapter:

Thank you for your timely submission of your Region assessments. Please be advised that your Region assessments are **insufficient** for the _____ 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 un-financial until debt is cleared.

Thank you in advance for your quick response in this matter.

Sisterly,

Soror Insert YOUR name here
Regional Tamias-Grammateus

Overpayment of Assessments

**Zeta Phi Beta Sorority, Inc.
Atlantic Region**

Date

Dear ***insert chapter name*** Chapter:

Thank you for your timely submission of your Region 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. A reimbursement voucher will be submitted for remittance in the amount of the overpayment and will be issued to the chapter.

Sisterly,

Soror Insert YOUR name here
Regional Tamias Grammateus

Chapter Checklist Guidelines (for audit purposes)

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



Zeta Phi Beta Sorority, Inc.

ATLANTIC REGION

YY THE ARIZONA C. STEMONS SCHOLARSHIP

Criteria for Selection

1. Applicant must be a fully financial member (on all levels) of Zeta Phi Beta Sorority, Inc. and the Atlantic Region.
2. Applicant must possess a 3.0 or above cumulative Grade Point Average ("GPA").
3. Applicant must produce an official transcript or college/university Letter of Acceptance as proof of study.
4. Applicant must submit two (2) letters of recommendation. See "RECOMMENDATION" section for more information.
5. Each scholarship will be a one-time only award.
6. The application deadline will be mm/dd/yyyy, the same year in which an Atlantic Regional Conference will be held.
7. Soros selected to receive the scholarship will be notified by mm/dd, of that year.
8. The scholarship will be given directly to the awardees at the Atlantic Regional Conference. The awardees must be present to accept the award from the Atlantic Region.
9. The applicant must complete the attached form in its entirety or it will not be considered. Please be sure to sign and date the application, then submit the application by regular mail or e-mail to the contact address below. Transcripts, letters of acceptance and letters of recommendation, etc., must be sent by regular mail. Incomplete applications cannot be considered.
10. If you are under investigation at the time of your application and your case has not been resolved or you have been found guilty for violation(s) of the Membership Intake Process or the Sorority's Ant-Hazing policy, you are not eligible to apply for or receive the scholarship.
11. You must use the official Scholarship Application.

Zeta Phi Beta Sorority, Inc.

ATLANTIC REGION

YY THE ARIZONA C STEMONS SCHOLARSHIP APPLICATION

Please print or type. If more space is needed, use the "Miscellaneous Space" on back or attach extra sheets.

Contact and Academic Information

First

Middle

Last

Street Address

City

Zip

Primary Phone Number

E-mail Address

Date of Birth

Name of College/University

College/University Address

Academic Classification (Graduate or Undergraduate)

Major/Degree Program

Anticipated Graduation Date

Zeta Biography and Activity

Current Chapter Name

Current Chapter Address

Date and Place Initiated:

If Undergraduate Member, give Sponsoring Graduate Chapter.

Graduate Advisor Name and E-mail Contact

Position(s) in Chapters

Present and past, Graduate or Undergraduate

(Applicant may submit Zeta Resume as an attachment. Add additional sheets as needed.)

Position

Chapter

Time Period

<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

ACADEMIC AND COMMUNITY ACTIVITIES IN WHICH YOU PARTICIPATE

(Add additional sheets as needed.)

Organization

Position

Time Period

<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

Honors and Awards Received

<u>Title</u>	<u>Date</u>
_____	_____
_____	_____
_____	_____
_____	_____

Supplementary Information

1. In 100 words – 250 words, explain why you should be awarded this scholarship. This section must be typed.
2. Recommendations – Two (2) Letters of Recommendation must accompany this application. Your application will be considered incomplete if they are not attached
 - One (1) must be from your current Chapter Basileus/Advisor/Sponsor and
 - One (1) from work, school, church, civic or community affiliations

If I receive this scholarship, I agree to report my progress, in writing, to the Scholarship Committee or the Atlantic Region.

Date: _____ Signature: _____

Reminder: Please review the criteria for selection and make sure that all requirements have been met.

COMPLETED SCHOLARSHIP APPLICATION MUST BE RECEIVED VIA U.S. MAIL OR ELECTRONICALLY BY
MM/DD/YYYY

Soror _____

Atlantic Region Scholarship Committee Chair/

Address _____

E-mail: _____ Tel: _____

Officers Transition Form



Outgoing Officer:	Incoming Officer:
Name:	Name:
Officer Title:	Officer Title:
E-mail:	E-mail:

List of documents, files, etc. transferred:

- 1.

- 2.

- 3.

- 4.

- 5.

- 6.

- 7.

- 8.

Outgoing Officer

Signature

Date

Incoming Officer

Signature

Date



ZETA PHI BETA SORORITY, INC.
 ATLANTIC REGION
 EXPENSE/DISBURSEMENT
 VOUCHER



PAYEE _____

EXPENSE	EXPLANATION	AMOUNT
Postage		\$
Journal Ads		\$
Office Supplies		\$
Printing/Copies		\$
Registration Fees		\$
Lodging		\$
Gifts		\$
Transportation/Mileage		\$
Miscellaneous Expense		\$
Total		\$

Budget Line Item: _____

Budget Balance: _____

Date: _____

Total Amount: _____

Check # _____

Current Balance: _____

Approved By: _____

Title: _____

Signature: _____

(Payee)

Year Format (yyyy) Executive Board Meeting

Report of the Tamias Grammateus

FY YYYY - YYYY

Total funds collected from MM/DD/YYYY through MM/DD/YYYY =

Financial Chapters - Graduate
Financial Chapters - Undergraduate
Financial Chapters - TOTAL

Financial Members - Graduate
Financial Members - Undergraduate
Financial Members - TOTAL

DUES

Chapter Tax - Graduate
Chapter Tax - Undergraduate
Per Capita - Graduate
Per capita - Undergraduate
Assessment - Graduate
Assessment - Undergraduate
New Member Fees -
Miscellaneous* -
Overpayment -
Late Fee -Graduate -
Late Fee -Undergraduate

DUES SUBTOTAL

Zeta Phi Beta Sorority, Incorporated Atlantic Region

Status – This is the first edition of the Atlantic Region’s Standard Operating Procedure (SOP) Manual and it will be presented to the Region Executive Board on October 15, 2016. 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.

Revision History Log

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
First Edition	2016	Charlotte Weston Valerie Hollingsworth-Baker Janet Y. Bivins, Esq.	N/A

Soror Janet Y. Bivins, Esq. - Atlantic Region Director

Soror Valerie Hollingsworth-Basileus – Director of National Director of Strategic Planning

Soror Charlotte Mauldin Weston – Atlantic Region Standard Operating Procedures Coordinator

Purpose

These operational policies and procedures are adopted for the purposes of implementing provisions of the Regional Bylaws and furnishing procedures for officers, and committees in the performance of their respective duties.

Amendment

Board Action: SOP may be amended at any Executive Board Meeting with a majority vote, providing the following regarding the amendment(s):

- A. Amendment with Notice before Executive Board Meetings.** By a majority vote, provided that the amendment(s):
1. Has been submitted by the SOP committee.
 2. If originated by other than the SOP committee, has been submitted to that committee ninety (90) days before the Executive Board Meeting
- B. Amendment with Notice at Executive Board Meeting.** By a majority vote, provided previous notice has been given.

Revision: the Executive Board shall revise These SOP only upon authorization.

- A. Preparation of Revision.** Preparing and presenting an authorized revision shall be the duty of the SOP committee.
- B. Notice of Proposed Revision.** The revision(s) shall be sent to the members no later than thirty (30) days after the Executive Board Meeting.

Distribution

At the first board meeting of each new administration, or as soon as possible thereafter, The Regional Director shall furnish, in electronic format, a copy of the standard operating procedures to the Executive Board and others as designated by the Regional Director. The Regional Director will call for proposed amendments for the SOP and chapters will submit their proposed amendments to the SOP Committee for review and consideration. After the document is amended, updated copies will be furnished electronically to the membership.

Availability

These standard operating procedures shall be available to financial members of the Atlantic Region.

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 policies and procedures committee chairman by the appropriate deadline(s) established by the committee chairman.

Date: _____

The following information must be included:

- Proposer's name _____
- Email: _____
- Chapter _____
- Proposed amendment _____
- Page Number _____
- Rationale _____

Page	From	Proposed Amendment	Rationale
	Budget and Finance	Striking "90 days" and inserting "60 days"	This amendment brings the timetable for reconciling district event expenses in line with the 60-day deadline for reimbursement of expenses, improving the timeliness of financial reports produced by headquarters to support financial oversight and budget adjustments by the board of directors.

Zeta Phi Beta Sorority, Inc.

Atlantic Region

Standard Operating Procedures Correction Form

Date received by Standard Operating Policy & Procedures Chair: _____

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 that information is legible.

☐

Page	Section	Subsection	Paragraph	Line	Correction

