

ALPHA OMEGA EPSILON

Policies and Procedures

Terms & Definitions	5
Chapters	6
5K Run/Walk Charity Event Planning Guidelines	7
Active Chapter Advisory Councils	8
Alumnae Chapter Policy	12
Alumna Status Change Policy	14
Status Change Application	14
Chapter Audit Policy	15
Chapter Audit Procedure	16
Chapter Charter Procedure	18
Chapter Discipline	23
Chapter Executive Board and Committees	25
Chapter Requirements	29
Convention Policy	31
Regional Convention Agreement	33
Dual Membership Policy	37
Dual Membership List	37
Emergency Contact and Medical Information	38
Emergency Contact and Medical Information Form	38
Emergency Procedure Policy	39
Event Planning Policy	41
Event Planning Form	42
Event Planning Review Procedure	43
Flow of Chapter Paperwork	44
Foreign Exchange Rate Policy	45
Garden Eternal Policy	46
Honorary Member Policy	47
Media Policy	48
Member Discipline	49
Membership Policy	50
Membership Withdrawal Procedure	59
Candidate Dismissal Agreement	60
Active Member Expulsion Agreement	61
Voluntary Resignation Request	61
New Graduate Policy	62
Promissory Note Policy	63
Promissory Note Agreement	64

Publications Policy	65
Record Retention Policy	73
Risk Management Policy	77
Risk Management Support Form	81
Ritual and Badge Policy	82
Schedule of Dues and Fees	84
Chapter-Colony Payment Form	87
Chapter-Colony Payment Form - Canada	87
Small Chapters Exception Policy	88
Social Utility Policy	89
Transgender Policy	90
Transportation Policy	91
Voting Procedure	92
The Board of Directors, Staff & Volunteers	94
Accounting Review Policy	95
Advance Check Policy	96
Amendment to Bylaws Procedure	97
Amendment to Policies & Procedures	99
Check and Electronic Transaction Policy	100
Conflict of Interest Policy	101
Conflict of Interest Statement	103
Director Removal Policy	104
Documentation Policy	105
Documentation Procedure	106
Elections of Board of Directors and Executive Committee Policy	107
Expense Reimbursement Policy	112
Expense Report Form	114
Online Banking Policy	115
Travel Policy	116
Travel Request Form	116

All Chapters, Alumnae, and Alumnae Chapters will abide by all rules and guidelines written within this document as governed by the Bylaws of Alpha Omega Epsilon. All Chapters, Alumnae, and Alumnae Chapters will work with the Alpha Omega Epsilon Board of Directors to promote the ideals and objectives of Alpha Omega Epsilon.

Terms & Definitions

Board: Board of Directors

Board Representative: The person selected by the Board to conduct business or represent the Organization; can be a Director, Regional Advisor, Chapter Advisor, or other volunteer for the sorority.

Director-at-Large: Director not holding an Executive Committee office.

Chapters

5K Run/Walk Charity Event Planning Guidelines

There are many online resources to help Chapters plan a 5K Run/Walk event, however the purpose of this guidance is to recommend to Chapters additional safety measures to consider when planning a 5K Run/Walk Charity Event.

Location

Before choosing a location, walk the racecourse with the certificate holder (location contact) to identify areas that may pose a hazard to runners/walkers during the race. Make sure to note the hazardous areas and request that the areas are repaired before the event is to take place. This is especially important if the location of the event is held in a public park. If a route is chosen that crosses streets, coordinate the event with the City/Town officials and City/Town Police to block off streets and/or detour traffic during the event. It is suggested that a Chapter choose a racecourse that is properly maintained.

Volunteers

It is recommended that Chapters have volunteers to assist in every aspect of the event from set-up to clean-up. Volunteers should wear clothing to distinguish them from event participants. Following is a recommended list of volunteers for the event:

- EMT or medical personnel available on-site during the race in the event a medical issue arises during or after the race is over
- Police to block the road from traffic
- Station members along racecourse to assist participants
- Volunteers to assist in registering participants

Event Expectations

It is recommended that race volunteers convey race expectations to participants before the race begins. The following is a list of expectations:

- Location of registration/check-in area
- Clearly mark starting and finishing line
- Clearly state when the race begins
- Water stations should be visible and clearly marked
- Clearly instruct participants on what to do if an emergency situation arises to call 911 or seek out medical personnel at event

Paperwork

Chapters must submit a copy of the signed contract along with a map of the racecourse to the Board Secretary to review 45 days prior to the date of the event. Please include address of certificate holder. Chapter members should not sign their name to the contract. The contract

should be signed as "Greek Letter" Chapter of Alpha Omega Epsilon. Example: Gamma Chapter of Alpha Omega Epsilon. Chapters should not sign as Alpha Omega Epsilon.

The contract will be submitted to an insurance broker for preparation of Certificate of Liability Insurance. If the venue requests to be added on our insurance for the event, then the insurance fee must be paid before the insurance broker will release the certificate. Chapter will be required to pay the insurance fee. The Board Secretary will provide the Chapter with the Certificate of Liability Insurance to the Chapter once it is received from the insurance broker.

Incident

If an incident occurs during or after the event, the Chapter should immediately notify the Board Secretary. The Board Secretary will be in contact with the Board President and insurance broker. The Chapter will be required to fill out a Crisis Management Incident Form that will be provided by the insurance broker. The form will need to be filled out as soon as possible following the incident.

Follow-up

If no incident occurs, the Chapter holding the 5K Run/Walk Charity Event is required to send a follow-up notification to the Board Secretary within 24 hours of the conclusion of the event whether or not the race went smoothly.

Active Chapter Advisory Councils

Each Chapter will select a sister to serve as the Chapter Representative for the entire academic year. This selection is subject to the approval of the Chapter Advisor and the Regional Advisors.

The Chapter Representative must have the following qualifications:

1. Must maintain an Active-Active status throughout the year
2. Must have been Active for at least one full term prior to election
3. Must be knowledgeable of the governing documents of the Sorority
4. Must be knowledgeable of the workings of her chapter
5. Recommended to have previously served on the Chapter Executive Board

Regional Advisory Council

The Regional Advisor will meet monthly with the Chapter Representatives within the region. The responsibilities of these Regional Advisory Councils shall be:

1. To elect a Regional Representative to sit on the Active Chapter Advisory Council
2. To discuss business items on the agenda put forth by the Board
3. To present questions and comments to be given to the Board
4. To review and provide feedback on proposed policy changes
5. To discuss chapter issues with other Representatives and the Regional Advisor
6. To network between chapters in the region
7. To oversee and preside over the regional conference

Active Chapter Advisory Council

The Active Chapter Advisory Council duties include:

1. Relay information from the Board and a summary of the Board of Director meeting minutes to the regions
2. To review and provide feedback on proposed policy changes
3. To discuss business items on the agenda put forth by the Board
4. Relaying questions and concerns from the regions to the Board
5. Submitting an annual report to the Board President by the International Convention.

Election of Chapter and Regional Representatives

The process for electing a Chapter Representative and Regional Representative shall be:

1. Each Chapter will elect a Chapter Representative to sit on the Regional Advisory Council per their Chapter Bylaws by April 15th. This nomination must be approved by the Chapter Advisor and Regional Advisor.
2. Chapter Representatives interested in representing her region as the Regional Representative on the Active Chapter Advisory Council must complete a nomination form that is to be emailed to their Regional Advisor by May 1st.
3. The Regional Advisors will provide the personal statements of the nominees to each region to the Chapter Representatives at least one week prior to the May Regional Advisory Council meetings.
4. At the May Regional Advisory Council meetings, each nominee will be allowed up to 2 minutes to address the assembly regarding their qualifications for the nominated office.
5. After all speeches have been given, the assembly will be allowed a 5-minute question period.
6. An electronic vote will immediately follow the meeting and all Chapter Representatives have 24-hours to submit their vote after the closing of the meeting.
7. The nominee who receives the most votes in each region will be elected as the Regional Representative to the Active Chapter Advisory Committee.
8. In the event that there is a tie for most votes, new ballots will be distributed and a second vote will occur.
9. In the event that there is a tie for most votes during the second vote, the office will be considered vacant and will be filled by appointment by the Regional Advisors and Director of Chapter Services by June 1st.

Removal of Chapter Representative

1. By Chapter
 - a. To be specified in Chapter Bylaws
2. By Regional Advisory Council or Regional Advisor
 - a. Any Chapter Representative or Regional Advisor can initiate the removal procedure by providing a written request to remove the Chapter Representative to Director of Chapter Services.
 - b. The Chapter Representative and her Chapter will be notified of the proposal to remove her from office and the Chapter Representative must attend the next Regional Advisory meeting to defend her position.
 - c. Following the Regional Advisory Council meeting, the Director of Chapter Service will send out an electronic vote to the Chapter Representatives of that

region and the Regional Advisor.

- d. The vote shall be a two-thirds majority of the Chapter Representatives and respective Regional Advisor.
- e. The Director of Chapter Services shall notify the Regional Advisory Council with the results of the vote.
- f. If the vote passes, the Chapter Representative will be removed, her Chapter will be notified, and a new Chapter Representative elected.

Alumnae Chapter Policy

Any group of alumnae may be granted a charter for an alumnae Chapter of the Sorority. Alumnae of Alpha Omega Epsilon Sorority are encouraged to join an Alumnae Chapter. The Alumnae Chapter is a separate entity from the Active Chapter and the Sorority. The purpose of the Alumnae Chapter is to provide a way for alumnae to stay involved with and informed about the Sorority, to join together to support the Active Chapters, and to network.

Alumnae Chapter Activation Process:

1. Submit an Alumnae Chapter petition and bylaws to the chair of the Alumnae Relations Committee. The petitioning members may request assistance from the Governance Committee in developing the Alumnae Chapter bylaws.
2. The Governance Committee reviews the Alumnae Chapter bylaws as submitted with the petition.
3. The Alumnae Relations Committee reviews the Alumnae Chapter petition and bylaws and will provide a recommendation to the Board. The Board will vote to approve the recommendations of the Alumnae Relations Committee.
4. Upon approval of the Alumnae Chapter petition and bylaws, the Alumnae President of the petitioning group will be provided a copy of the Alumnae Chapter Activation Ceremony by the chair of the Alumnae Relations Committee.
5. The Alumnae Chapter Executive Board is responsible for conducting the Alumnae Chapter Activation Ceremony. Attendance by a Board member or Alumnae Relations Committee member is not required.
6. Upon completion of the Alumnae Chapter Activation Ceremony, the Alumnae Chapter shall have the right to use the name of Alpha Omega Epsilon. Each Alumnae Chapter shall be called either:
 - a. "The Alumnae Chapter of the <Active> Chapter of Alpha Omega Epsilon," where <Active> is the Greek letter name of the Active Chapter with which the Alumnae Chapter is associated or
 - b. "The <area> Alumnae Chapter of Alpha Omega Epsilon," where <area> is the geographic region or city which the Alumnae chapter is located.

Incorporation is not required in order to become an Alumnae Chapter. The Alumnae Chapter may find it beneficial to be incorporated if planning on charging membership dues, raising funds for profit, or investing Alumnae Chapter funds in CDs, mutual funds, etc. The steps for incorporation vary from state to state and differ from country to country. The Alumnae Chapter will need to investigate the steps required to incorporate in their location. Any monies required to incorporate shall be paid by the Alumnae Chapter.

The Sorority has an insurance policy that covers Alumnae Chapters and its members. Every Alumnae Chapter member must sign a *Risk Management Policy* (provided by the Alumnae Committee) upon joining the Alumnae Chapter. Copies of the signed Risk Management Policies

shall be kept on file by the Alumnae Chapter permanently; the original signed Risk Management Policies shall be forwarded to the Board Secretary. The Alumnae Chapter shall present the *Risk Management Policy* to the membership a minimum of once per calendar year.

The Board can revoke the right of the Alumnae Chapter to use the name of Alpha Omega Epsilon under extreme circumstances for violating the oath of membership, for violating the *Risk Management Policy*, for dishonorable or improper conduct, for disloyalty to the Sorority, or for actions that are harmful to the Sorority.

The Alumnae Chapter will report to the Alumnae Relations Committee. A representative from the Alumnae Chapter's executive board shall provide the Alumnae Relations Committee with Alumnae Chapter meeting minutes and the current membership roster twice yearly.

The Board shall reserve the right to charge and collect dues from Alumnae Chapters per the policies and procedures.

Alumnae chapters must:

1. Hold meetings in the pursuit of fraternal and social aims - minimum two per year;
2. Adopt bylaws for their own operation and abide by the rules of the organization bylaws;
3. Maintain and keep records and property in good condition and preserve the property of the Organization entrusted to them;
4. Make reports to the Board when requested;
5. Levy and collect dues for the support of the Board;
6. Alumnae Chapters shall meet all requirements as set forth in the policy and procedures.

Alumna Status Change Policy

The requirements for being an Alumna-Active member of Alpha Omega Epsilon are stated in the *Membership Policy*.

A member that is considered Alumna-Restricted may petition the Alumnae Relations Committee to have their status changed from Alumna-Restricted to Alumna-Active (*Membership Policy*). The Alumnae Relations Committee will hear these petitions but the Alumnae Relations Committee is required to take into consideration the recommendations of the Active and Alumnae members from the Chapter. In order to seek out and properly consider the recommendations of the Chapter, the Alumna Status Change application was prepared.

The Status Change Application consists of two parts: a Qualification Statement and Evaluation Questions. The Qualification Statement is a personal statement from the Alumna-Restricted member. The Member is able to state their reasons why their status should be changed from Alumna-Restricted to Alumna-Active (as long as all other requirements have been met such as repayment of Promissory Note). The Evaluation Questions are a series of quantifiable questions that will give the Board a measurable understanding of the Chapter members' wishes, both Active and Alumnae.

The completed Qualification Statement and Evaluation Questions will be emailed to all sisters with known email addresses from the petitioner's chapter. The sister is asked to print the completed evaluation questions and mail them to the Alumnae Relations Committee Chair.

If a member wishes to provide the Board with input with regards to the member in question, the Evaluation Questions must be completed and mailed to the chair of the Alumnae Relations Committee within 14 days.

If no responses are received from the active chapter by the Alumnae Committee before the due date mentioned above, it will not be viewed in a negative light by the Alumnae Relations Committee.

[Status Change Application](#)

Chapter Audit Policy

In an effort to maintain cohesiveness across the chapters of Alpha Omega Epsilon sorority, each chapter will have an audit performed by a member of the Board or a representative acting on behalf of the Board. The audits will be performed at most every two years and will be completed through the cooperation of the Board and the Chapter. The Chapters will be notified in advance of the date of the audit by the Board or representative acting on the Board's behalf. At least one member of the Chapter's Executive Board must complete the audit with the Board representative.

All Chapters are required to permanently maintain records of all audits performed on their Chapter. The Board will also maintain records of every audit performed at every Chapter. Items the Chapter is required to have for the audit will only be noted as present if they are seen by all parties at the audit meeting, unless otherwise noted. Each representative must sign and date the completed Chapter Audit in verification of its completion and authenticity.

Chapter Audit Procedure

The following are the steps to be taken by the Board or representative acting on behalf of the Board to conduct chapter audits.

1. The Board Secretary will notify the Chapters and Chapter Advisor at the beginning of the semester/quarter that a chapter audit will need to take place during that semester/quarter. If the Chapter Advisor is not available to conduct the chapter audit during the semester, then an approved Board Representative, as determined by the Board Secretary, can perform the audit.
2. The Board Representative will set a reasonable date, time and location of the review with the Chapter Representative as defined in this document.
3. Once the Board Representative tasked to perform the chapter audit, has set up the date, time, and location of review, the Board Representative will notify the Board Secretary of the information.
4. The Board Representative will meet with the chapter to review documentation. This can be in person or over a program such as Google Hangouts where documentation can be shown to the Board Representative.
5. The Board Representative will record the latest revision date of each document on the chapter audit checklist. The document will have to be seen if the audit is conducted in person or through screen share if audit is conducted over internet.
6. Once the chapter audit is concluded, both representatives will sign and date the chapter audit checklist. If the audit is not conducted in person, the Board Representative will sign and date the official copy and pdf the document to the Chapter Representative to be signed and dated.
7. Once all parties have signed the chapter audit checklist, the Board Representative will mail the official signed copy to Headquarters. If the checklist was not conducted in person, both the Board Representative and the Chapter Representative will mail their official signature copy to the Headquarters. The Chapter is required to keep a copy of the review in their documentation.
8. The Board Secretary will provide the chapter with any documents that are not the latest version to the chapter. If the Board Secretary does not have a copy of said document, she will request the member responsible for that document to send it to the chapter.
9. Two weeks after the review and submission of checklist, the Board Secretary will email the Chapter to confirm receipt of all missing documentation. The Chapter Representative shall respond within one week.
10. If a significant amount of documentation was out of date, the Board Secretary will request a follow up review at her discretion.

11. The Board Secretary will record the date of the audit on the chapter audit tracking spreadsheet and will update it in the Board meeting minutes.

Chapter Charter Procedure

Chapter Charter

Any institution may be granted a charter for a Chapter of the Sorority after completing the Colony process and their petition approved by the Board. The ensuing procedure shall be followed in the case of petitioning organizations:

1. Inquiries concerning affiliation with the Sorority shall be referred to the Expansion Committee, who shall direct correspondence with the organization.
2. The five basic steps:
 - a. Current Status
 - b. Petition for Colony Status
 - c. Colony Status
 - d. Petition for Charter Membership
 - e. Charter Membership

Current Status

If an organization feels that their programs, ideals, and objectives are compatible with and fulfill the membership requirements for a chapter of Alpha Omega Epsilon, the group may petition the Expansion Committee for Colony Status. If an organization is not formed, but there is sufficient interest in forming a colony on campus, Alpha Omega Epsilon recommends the following action.

1. Form a group of a minimum of eight interested women. At an organizational meeting do the following:
 - a. Elect a temporary chairperson and a secretary.
 - b. Record minutes of the meeting, include date, time called to order, time of adjournment, names of women present, etc.
 - c. Set a time and a place for weekly meetings.
2. At the close of the second meeting, the following items should be accomplished:
 - a. A temporary name for the organization; Greek letters must be used.
 - b. Temporary bylaws for the group to abide by.
 - c. A full range of officers elected.
 - d. A list of goals and objectives to accomplish in the following meeting.

Petition for Colony Status

A group that wishes to file for colony status must file a report to the Expansion Committee of Alpha Omega Epsilon. The report must contain the following:

1. The name, campus, membership size and brief history of the petitioning group.
2. The reasons for the group wishes to be a colony of Alpha Omega Epsilon.
3. A brief profile (paragraph for each) of the petitioning members. Minimum of eight members.
4. A brief summary of the Greek life on campus (i.e. National Conferences, National Sororities and Fraternities, Local Sororities and Fraternities, Greek reputation on campus).
5. Signed Risk Management Policies by all petitioning members.
6. Proof that the group is a registered student organization.
7. Signatures and date by the presiding Chairperson or President.
8. Once the petition has been accepted, a predetermined fee per person will be due to the Sorority upon installation.

Colony Status

1. Requirements of a Colony
 - a. A colony must uphold all ideals, objectives and bylaws as dictated by the Board.
 - b. A colony must design and construct an official Colony Banner. The design is to be approved by the Merchandise Committee prior to construction.
 - c. A colony must complete a minimum of one professional project during colony period.
 - d. A colony must hold a successful recruitment a minimum of once. A successful recruitment results in at least one prospective member being initiated as a candidate.
 - e. A colony must complete a minimum of one philanthropic project during Colony status.
 - f. Members of a colony hold equivalent status of a Chapter Membership Candidate.
 - g. A colony must submit monthly reports to the Expansion Committee.
 - h. A colony must follow all requirements of the *Risk Management Policy*.
2. Privileges of a Colony

- a. A Colony will be called "(School Name) Colony of Alpha Omega Epsilon."
 - b. A Colony may use the Alpha Omega Epsilon name for specific reasons and wear the Alpha Omega Epsilon Candidate pin at all Alpha Omega Epsilon Colony functions.
 - c. A Colony may display the Alpha Omega Epsilon colony banner at all Alpha Omega Epsilon Colony functions.
 - d. A Colony may rely on the Expansion Committee for non-secret information and advice.
 - e. A Colony may attend the Alpha Omega Epsilon Convention.
 - f. Graduates from a Colony are granted Alumna status in Alpha Omega Epsilon.
3. Petition for Chapter Status
 - a. A Colony may petition for Chapter Status after meeting all Colony requirements.
 - b. The Colony Certificate is valid for a period of 18 months.
 4. Extension of Colony Status

If a Colony of Alpha Omega Epsilon feels it is making sufficient progress, yet is unable to file for charter membership before the Colony Certificate expires, the Colony must file a request with Expansion Committee to extend the Colony Certificate. The request must be submitted to the Expansion Committee a minimum of one month previous to the certificate expiration date and contain the following:

- a. The specific reasons for requesting the extension.
- b. The outline of goals and objectives to complete the requirements for charter membership.
- c. Signature and date by the presiding Colony President or Chairperson.
- d. An extension filing fee as predetermined by the Board, with checks payable to Alpha Omega Epsilon.

If the Expansion Committee does not recommend the extension of the Colony Certificate and this recommendation is confirmed by the Board of Directors, a letter will be written to the colony giving the reasons why the certificate will not be extended, and items the group should improve before re-petitioning for colony status.

5. Disbanding of a Colony
 - a. The Board must unanimously vote to disband a Colony.
 - b. A Colony of Alpha Omega Epsilon can be disbanded and terminated from working towards Chapter status at the direction of the Expansion Committee for violating the oath of membership, for violating the *Risk Management Policy*, for

dishonorable conduct, for disloyalty to the Sorority, or when the Colony affiliation becomes harmful to the Sorority.

- c. A Colony may also be disbanded for failing to make sufficient progress and for ineffectively extending their Colony Certificate.
 - d. When it has been decided upon to disband a Colony, an expansion representative will visit the Colony to perform a disbanding and/or Alumnae Ceremony.
 - i. Colony members who have not completed the candidate process will not be granted Alumna status.
 - ii. Colony members who have completed the candidate process will be evaluated by the Board for Alumna status.
 - iii. Graduates will be given Alumna status.
 - iv. All Colony material from the Sorority will be surrendered at the time of the ceremony
 - e. Colony Alumnae will assume all responsibilities and privileges of Chapter Alumna status, including but not limited to payment of promissory note and other remaining debt. All fees collected by the Board during the Colony period will be non-refundable.
6. Reforming a previously disbanded Colony:

If an interest group forms on a campus where a Colony of the Sorority has been previously disbanded, the Colony may be reestablished by petitioning the Expansion Committee and by fulfilling all obligations of a new Colony, as defined in this section, to become a new member of the Sorority.

Petition for Charter Membership

Minimum qualifying requirements to apply for charter membership:

1. A Colony must have a minimum of ten (10) members unless a waiver to this requirement has been granted by the Board.
2. At least forty percent (40%) of the colony members petitioning for charter membership must be freshmen or sophomores or not graduating within two (2) years of chapter installation unless a waiver to this requirement has been granted by the Board.
3. A Colony must have fulfilled all the Colony requirements set by the Sorority.

Once a Colony has met the minimum qualifying requirements, it may apply for a charter membership from the Expansion Committee. The group must submit a petition containing the following:

1. The name, campus, membership size and brief history of the petitioning group;

2. An outline and summary of programs for Professional development, Community and Campus Service, Membership Enrollment, Recruitment, Social and Sisterhood;
3. Brief profile of the petitioning members;
4. Copy of the completed Colony Bylaws;
5. Reasons the Colony feels it is ready to be a chapter of Alpha Omega Epsilon; and
6. A filing fee as predetermined by the Board, with checks payable to Alpha Omega Epsilon.
 - a. Once the petition has been accepted, a predetermined fee per person will be due to the Sorority.
7. Charter Membership
 - a. All steps to the path to Alpha Omega Epsilon have been fulfilled and the Petition of Charter Membership has been approved by the Board.
 - b. Privileges of an Approved Chapter:
 - i. A Chapter will be called "A Chapter of Alpha Omega Epsilon":
 - ii. Upon installation, the Chapter will receive:
 1. The Alpha Omega Epsilon Bylaws;
 2. Symbols and meanings of Alpha Omega Epsilon;
 3. Alpha Omega Epsilon ceremonies and procedures; and
 4. A Chapter Charter.
 - iii. Chapter members may wear the Alpha Omega Epsilon Active pin.
 - iv. Chapter must attend Convention.

Chapter Identification

The Active Chapters shall be designated in the Organization records by the letters of the Greek alphabet in the order of their installation. The twenty-fifth chapter shall be known as Beta Alpha, the forty-ninth as Gamma Alpha, and so on.

Chapter Discipline

Delinquency of Chapter Duties and Obligations

The Chapter must uphold the duties and obligations to the Sorority as outlined in the *Chapter Requirements Policy* and *Flow of Chapter Paperwork*. If the chapter does not comply with the requirements set in the Bylaws and policies and procedures, the Chapter will first be warned by the Chapter Advisor, Regional Advisor, or the Director of Chapter Services. The warning shall be delivered to the chapter in writing and will state which deadlines were missed and what information was not submitted. The Chapter will then have one month to submit the remaining information.

The Chapter will receive second warning from the Director of Chapter Services if the deadline of the first warning was not met. The warning will be delivered to the Chapter in writing and will state the original missed deadlines, what information was not submitted, and the first warning deadline that was missed. The information that was not submitted must be submitted within three days.

A fine may be levied against the chapter for each warning at the discretion of the Board.

Should a Chapter fail to comply with a second warning, the Chapter will be placed on Probation.

Should a Chapter consistently receive more than one warning during the course of a calendar year, the Chapter will be placed on Probation.

Active Chapter Charter Probation

Any Chapter may be placed on probation by the Director of Chapter Services, with the approval of the Board. The Chapter may be placed on probation for violating the oath of membership, for violating the *Risk Management Policy*, for dishonorable conduct, for disloyalty to the Sorority or when the Chapter affiliation becomes harmful to the Sorority.

When a Chapter is placed on probation, its charter shall be withdrawn and forwarded by the Chapter Advisor to the Board Secretary who shall retain possession during the period of probation.

A Chapter on probation shall render reports at least monthly to the Chapter Advisor as directed by the Board.

The Chapter Advisor, Regional Advisor, and the Director of Chapter Services shall conduct a complete investigation of the situation and a record of the case and a recommendation will be given to the Board. The Board shall subsequently determine whether to remove or continue probation or revoke the charter.

A Chapter on probation must meet the following requirements for one entire term after the issues have been resolved to qualify for reinstatement:

1. A chapter must submit all required chapter paperwork to the Advisors and Board on time.
2. A chapter must show that they have met all the requirements of an Active chapter as listed in *Chapter Requirements Policy*.
3. A chapter must be paid in full for its financial responsibilities to the Board.
4. A chapter must meet any additional terms as noted by the Board.

Chapter Charter Withdrawal

Any Chapter may have their charter withdrawn under extreme circumstances for violating the oath of membership, for violating the *Risk Management Policy*, for dishonorable or improper conduct, for disloyalty to the Sorority or for when the Chapter affiliation is harmful to the Sorority.

A unanimous vote of the Board shall be required to revoke the Chapter Charter.

If any member or members is found to be at fault, the Board Secretary shall present a complete record of the case with recommendations to the Board. The member(s) in question may be expelled following the guidelines set in the Membership Policy.

A Chapter may be reestablished by petitioning the Board to become a chapter and by fulfilling all obligations of a new chapter to become a member of the Sorority.

Upon withdrawal of a charter, all property except that provided for by incorporation, shall pass to Board in trust. If the chapter is not re-established within five years, the Board shall liquidate the assets, pay claims against the chapter so far as the assets will permit.

Chapter Executive Board and Committees

Chapter Executive Board

The Chapter Executive Board shall include, but not be limited to the following officers. Additional Executive Board Officers shall be outlined in the Chapter Bylaws.

1. Chapter President
2. Chapter Vice-President
3. Chapter Membership Educator
4. Chapter Treasurer
5. Chapter Recording Secretary

The officers of the Chapter Executive Board shall:

1. Have been active-active or active-coop a minimum of one school term, unless approved by the Chapter's Executive Board.
2. Have been active-active or active-coop during the school term of the nominations for the Chapter's Executive Board officers.
3. Must maintain active-active status throughout the term of office.

The Chapter Executive Board shall have the following responsibilities and duties:

1. The Executive Board shall be the governing body of the Chapter.
2. All officers of the Executive Board must submit reports documenting her office at the end of the term for the new officer.
3. The Executive Board has the responsibility to appoint and/or have elected committee chairs or other positions specified in the Chapter Bylaws.
4. All officers elected or appointed must fulfill their designated duties while acting in the best interest of the Active Chapter.
5. All officers elected or appointed must document their work, all specific dates and delegated responsibilities.
6. Review and approve all committee and officer budgets.

The duties of the Executive Board Officers are detailed below.

1. Chapter President
 - a. The Chapter President must know and uphold the Bylaws and Chapter Bylaws.

- b. She shall preside over all chapter meetings, and has the responsibility to notify the Chapter Vice-President in advance if she cannot.
 - i. She shall preside over all Executive Board meetings and is responsible for their scheduling.
 - ii. She shall be the mediator and shall remain impartial during all meeting discussions.
 - iii. She shall preside over all ceremonies.
 - iv. She has final approval over all appointments made by the other officers.
 - v. She will be responsible for establishing and maintaining all long and short-term goals of the Chapter.
 - vi. She will be responsible for verifying that reports are made to the Board of Directors, Regional Advisor and the Chapter Advisor.
 - vii. She will be responsible for ensuring that Chapter records are reported to the Board of Directors.

2. Chapter Vice-President

- a. The Chapter Vice-President shall preside over chapter meetings after being notified that the President cannot attend.
- b. She assists the Chapter President in all ceremonies.
- c. She is responsible for the props and equipment for all ceremonies.
- d. She is responsible for monitoring the progress of her designated committees.

3. Chapter Membership Educator

- a. The Chapter Membership Educator is responsible for all candidate functions and activities.
- b. She may appoint an assistant with the approval of the Chapter President.
- c. She shall uphold and direct candidate meetings and shall prepare the candidates in accordance to the Membership Education Book.
- d. She is responsible for all membership candidates until the resolvment or dissolvment of their candidate status.
- e. She shall approve the selections for Big Sisters.
- f. She is responsible for monitoring the progress of her designated committees.

4. Chapter Treasurer

- a. The Chapter Treasurer is responsible for the documentation of all financial transactions.
 - b. She is responsible for the signing of all checks.
 - c. She is responsible for the collection of all chapter dues and donations.
 - d. She is responsible for the presentation of a semester budget for approval.
 - e. She is responsible for paying dues to the Sorority.
 - f. She is responsible for submitting all promissory notes to the Board Treasurer.
 - g. She is responsible for monitoring the progress of her designated committees.
5. Chapter Recording Secretary
- a. The Chapter Recording Secretary is responsible for recording the minutes to all meetings.
 - b. She is responsible for the upkeep and distribution of a current address list.
 - c. She is responsible for monitoring the progress of her designated committees.

Election of Offices

The nominations for the elections will be opened at least two meetings prior to the election and will remain open for at least one week. Elections shall be held by secret meeting vote.

Appointed/Non-Executive Offices

All appointed/non-executive offices shall be outlined in the Chapter Bylaws.

Replacement of Officers

In the case where the Chapter President office is vacant, the Chapter Vice-President will immediately fill the position until an election has taken place. All Executive Board positions found to be vacant shall be filled by election immediately. Until an election can take place, an interim sister, appointed by the Executive Board shall fill the position.

All non-executive offices should be filled immediately through appointment or election.

Removal of Chapter Officers

Any officer failing to fulfill the outlined responsibilities and duties may be removed from her position by the Chapter, as defined in the Chapter Bylaws.

Chapter Committees

The following will be chapter committees consisting of, but not limited to, the defined responsibilities:

1. Corresponding Secretary

- a. Responsible for all correspondence representing the Active chapter.
 - b. Responsible for newsletters to alumnae and co-ops
 - c. Writing all articles concerning Active chapters for submittal to various campus and Sorority publications.
2. Fundraising
- a. Responsible for the planning and organization of events to procure funds to be used for general chapter needs.
 - b. Maintain records of all chapter fundraising activities.
3. Historian
- a. Responsible for recording the Chapter Candidate and Active Membership initiations, and any other historically significant event.
 - b. Responsible for upkeep of family trees.
 - c. Ensures photos are taken at all chapter events.
4. Recruitment
- a. Responsible for the organization of all recruitment activities.
 - b. Publicity for all recruitment activities.
 - c. Report all significant events concerning recruitment to Active Chapter.
5. Risk Reduction
- a. Reviews all areas of potential liability and violation according to procedures set in current *Risk Management Policy*.
 - b. Responsible for seeking information and counsel from appropriate university officials and/or advisors
 - c. Responsible for distributing current *Risk Management Policy's*, keeping copies of all signed policies for chapter records, and sending the original signed policies to the Board Secretary
6. Philanthropic
- a. Responsible for the organization of philanthropic activities.
7. Professional
- a. Responsible for the organization of professional activities.
 - b. Responsible for instructing the Chapter in Robert's Rules of Order, Newly Revised.

Chapter Requirements

The Chapter shall:

1. Have the sole right of initiating chapter members into the Sorority except at the installation of new chapters;
2. Hold meetings and engage in fraternal activities for the good of the Sorority;
3. Require attendance of chapter members at chapter meetings and other mandatory functions;
4. Maintain and keep records and property in good condition and preserve the property of the Sorority entrusted to them;
5. Make reports to the Board, Regional Advisor, and Chapter Advisor when requested;
6. Adopt bylaws for their own government provided they are in accord with the Sorority Bylaws;
7. Levy and collect dues for the support of the Board;
8. Exercise supervision over the scholarship of the Chapter members; and
9. Institute and carry probation and expulsion proceedings for active chapter members when necessary.

A Chapter is considered in good standing if:

1. The Chapter is not on probation; and
2. There are no outstanding debts to the Board.

Failure of a Chapter to comply with the Bylaws shall be reported promptly to the Chapter Advisor who shall investigate and assist the chapter to correct its procedure.

No Chapter shall form any corporation or enter into any contract leading to the purchase or acquisition of a house, without the approval of the Board.

Chapter expenditures shall be approved by meeting vote, as specified in the Chapter Bylaws.

A collegiate chapter member shall receive no compensation for serving as a chapter officer or committee chair, either by reduction of dues, fees or otherwise.

A Chapter must be in contact with their Chapter Advisor at least once a month.

A Chapter must hold Ritual Week the entire academic week prior to active initiation.

When the active membership of an Active Chapter falls to a level of ten or less, the Chapter Advisor shall be required to approve the petitions of all persons proposed for initiation by that

Chapter, before such persons can be initiated. See *Small Chapters Exemption Policy* for exemptions.

For the sake of chapter consistency, there will be two terms in a calendar year. Term shall be defined as January through June and July through December.

If any Active Chapter fails to fulfill their obligations set in the Bylaws and policies and procedures, a fine can be levied against the chapter by the Board.

Convention Policy

The powers of the Convention are outlined in the Bylaws.

Management

The management of the conventions shall be coordinated by the Convention Committee Chairperson, with approval by the Board.

Convention Expenses

Expenses of the Board and, to the extent authorized by the Board, Chairpersons, volunteers, elected Active Delegates (or elected alternates) and invited guests shall be paid from the Sorority Funds.

No member shall receive reimbursement if absent from any business session of the convention unless excused by the Board President.

Chapter Delegate

A minimum of one approved delegate from each Chapter must be present at the Convention as the voting representative for the chapter. In case a Chapter Delegate shall be unable to attend the convention, the Delegate's place shall be taken by the first or second alternate. The Chapter Delegate shall not be absent from any business session of the convention (including but not limited to work sessions, speakers, tours, installation of Board members, and banquet) unless excused by the Board President. Unless excused, the failure of the Delegate who has been duly certified by the Chapter to attend a convention shall be punishable by chapter probation and/or a fine left to the discretion of the Board.

No Delegate shall be allowed a seat in the convention unless expecting to return to the Chapter as an active member for the remainder of the calendar year or unless approved by the Chapter Advisor and the Director of Chapter Services.

No Delegate shall be allowed a seat in convention if the Chapter represented is delinquent in the payment of any fees due the Board. The Delegate may pay up the indebtedness or sign a statement that the Chapter will meet the indebtedness within thirty days of the closing date of the convention. Failure of the Chapter to meet the conditions of the statement shall result in the Chapter being placed on probation until the indebtedness is cleared by payment, or by excuse from payment given by unanimous vote of the Board.

Each Chapter Delegate shall, at the first business meeting of the Chapter following the convention, present a report on all important business transacted at the convention.

Voting

For the transaction of business, a majority vote will be used.

Voting will be by secret ballot with each Chapter Delegate from a chapter in good standing and alumna in good standing to receive one vote each.

Absentee Voting

Original election ballots are to be postmarked by July 1st. Original ballots postmarked after that date will not be accepted.

Reproductions of original ballots will be deemed invalid.

Alumnae absentee ballots postmarked by the required date will be available and counted in the vote totals. If an alumna submitted an absentee election ballot and is present at convention, her absentee ballot will be counted as her recorded vote, and no additional vote on elections will be allowed at convention. The absentee ballots will not be opened until voting begins.

Regional Convention Agreement

Purpose

Chapters have expressed an interest in hosting a Regional Convention at the location of their Chapter or a nearby location. Execution of the Regional Convention requires dedication and a serious time commitment. In order to bestow responsibility on the Chapters to host Regional Convention while maintaining a high-level of quality programming and execution, an interested Chapter (herein Host Chapter) is required to sign and uphold an agreement with the Board of Directors (herein Board).

The Alpha Omega Epsilon Regional Convention Agreement lays out the responsibilities of a Host Chapter, the Convention Chair, the Convention Committee, and the Board in the planning and execution of the Convention. Responsibilities are assigned to individual parties, and consequences are described for failure to comply with the responsibilities.

Parties Involved in Convention Planning and Execution

The parties involved with Convention planning and execution are:

- Board
- Convention Chair
- Convention Committee
- Host Chapter
- Convention Resources (i.e. hotel, convention & visitor's bureaus, etc.)

Board Responsibilities

(all responsibilities fulfilled by July 1st unless noted otherwise)

- Determine date and location for each convention by July 1st for the following year's Convention.
- Find a Convention Chair.
- Approve and sign final contract.
- Submit information to the Convention Chair regarding schedule (Board Year-in-Review, Proposals, Elections, Chapter Day, Alumnae Day, etc.) by November 1st for the following year's Convention.
- Submit Board Year-in-Review presentation(s) and officer reports to the Convention Chair by June 30th .
- Determine Convention awards and purchase awards by July 15th.

Convention Chair and/or Convention Committee Responsibilities

(all responsibilities fulfilled by July 1st unless noted otherwise)

- Make all arrangements with Convention location regarding meals, meeting spaces, room reservations, audio/visual equipment, banquet, etc. by February 15th .
- Arrange for speakers, tours, panel discussions, etc. by February 15th .
- Determine and arrange evening activities by February 15th .
- Provide transportation information in the Convention invitation.
- Provide registration information in the Convention invitation.
- Determine final Convention schedule submitted to Board by February 15th .
- Finalize Convention invitation submitted to Board by February 15th .
- Have final Convention schedule and invitation approved by the Board by March 1st .
- Send out Convention invitations to all Chapters and Alumnae by March 15th .
- Prepare information for the webmaster to update the website for Convention by March 15th .
- Maintain a list of convention attendees, their contact information, payment history, and attendance.
- Forward attendance list and payments to the Board Treasurer the 1st and 15th of each month.
- Prepare, distribute, and collect emergency contact forms for each Convention attendee.
- Assist in search for roommates for members who have extra space in their room or need a room to stay in.
- Notify treasurer to bring merchandise to convention for display by July 1st.
- Prepare welcome packets and nametags to be distributed during registration.
- Order attendance gifts if budget allows.
- Purchase gifts for convention speakers and tour leaders.

Host Chapter Responsibilities

(all responsibilities fulfilled by June 1st unless noted otherwise)

- Prepare one evening activity by February 1st .
- Gathering and providing local information regarding transportation, restaurants, activities, taxes, customs, medical facilities, etc.
- Groundwork research in hotel, equipment, facilities, etc. as needed.

- Prepare 3 icebreaker activities.
- Provide a tour of campus (when on campus).
- Provide two Alumnae liaisons who are permanent in the area to serve as continuum.
- Provide an explanation of the local taxes.
- Provide an explanation of required documentation (passport, driver's license, birth certificate, etc.) for members traveling from foreign countries.
- Provide an explanation of how to perform basic necessities (exchange money, use ATMs, credit cards, rent a car, buy food, nearest grocery stores, hospitals, insurance, emergency facilities, etc).
- Staff the registration table each morning at Convention.

Contracts

Due to liability concerns, only the Board has the authority to sign contracts. This includes but is not limited to:

- Hotel contracts
- Bus contracts
- Facility contracts
- Merchandise contracts
- Food contracts

Penalties for Failing to Uphold the Regional Convention Agreement

If at any point in time the Convention Chair, Convention Committee, or Host Chapter fail to meet the expectations as set forth in this agreement, responsibilities for planning and executing convention will be removed from said party and will revert to the next higher authority as detailed in the following chain (highest to lowest):

1. Board
2. Convention Chair
3. Convention Committee
4. Host Chapter

In addition, a new Convention location may be selected, with approval of the Board . A fine will be levied on the culpable party for failure to meet the expectations as set forth in this agreement. The fine will be based on the monies paid by the Sorority to cover costs for the Convention that have been paid out up to the time of infraction that cannot be recovered by the

Sorority. Also, if any Director fails to provide information to the Convention Chair/Committee within the required timeframe, it will not be included in the program/event.

Signatures

By my signature I acknowledge that I have read and agree to uphold the expectations listed above.

Board President Signature Print Name Date

Convention Chair Signature Print Name Date

Convention Committee Liaison Signature Print Name Date

Host Chapter President Signature Print Name Date

Dual Membership Policy

Sisters of Alpha Omega Epsilon take a lifelong oath of membership. To honor this oath and the obligations of membership into Alpha Omega Epsilon the membership into some other Greek organizations is limited.

No female initiated into another local or national sorority shall be offered membership in the Sorority until verification of termination of membership can be provided and member no longer receives benefits from the organization. In the case of female that wants to be initiated into the Sorority by joining a colony, she will need to submit verification of her termination of membership to the Board. In the case where the female to be initiated into the Sorority is joining a chapter she shall submit her termination of membership to the chapter's Chapter and Regional Advisors.

Candidates, Actives, and Alumnae of Alpha Omega Epsilon are prohibited from being members of any organization that is associated with the following councils/associations:

- National Panhellenic Council (NPC)
- North-American Interfraternity Conference (NIC)
- Professional Fraternity Association (PFA)
- National Multicultural Greek Council (NMGC)
- National Association of Latino Fraternal Organizations, Inc. (NALFO)
- National Pan-Hellenic Council (NPHC)
- United Council of Christian Fraternities (UCCFS)

All Greek Honorary organizations are permitted for Dual Membership with Alpha Omega Epsilon, if the organization is not associated with above councils.

Greek Service organizations are permitted for Dual Membership with Alpha Omega Epsilon only if the mission statement states that the organization is exclusively service, if the organization is not associated with above councils.

A list of Approved and Rejected organizations for Dual Membership shall be maintained by the Board Vice President or a designated representative. Honorary Greek organizations or exclusively service Greek organizations that are not in the above prohibited councils and are not on this list shall be submitted for review by the Board Vice President. All requests shall include the organization's mission statement, (inter)national website, and indication of it is honorary or exclusively service. Approval or rejection will be provided within one month of the request.

[Dual Membership List](#)

Emergency Contact and Medical Information

The *Emergency Contact and Medical Information* form is a voluntary form for active sisters to complete in whole or in part, as they deem appropriate. The purpose of this form is to provide pertinent information to the Chapter should a medical or emergency situation arise.

An example of such a situation would be an injury at Candidate Day Away. If a member or prospective member is in need of medical attention, but unable to provide the medical personnel with the necessary information, the chapter would be equipped with the information to provide the medical personnel in order for the appropriate treatment to be administered.

The form below is to be updated yearly by all active members. If a member elects not to provide the information, in whole or in part, the *Waiver* section at the bottom of the form should be filled out. All forms must be maintained by the Chapter, including those in which an active has chosen to waive her right to fill out the form. The forms from the previous year should be destroyed in a proper manner, by shredding or incineration. These forms are not for general reference and will be kept by the Chapter Risk Management chair, and will be accessible to her or her designate during all sorority functions.

If there are any questions regarding the forms or their handling please contact the Board Secretary.

[Emergency Contact and Medical Information Form](#)

Emergency Procedure Policy

The *Emergency Procedure Policy* is to be utilized as a step-by-step guide to sorority response during an emergency situation when emergency services are involved. The policy is designed to help maintain order during periods of distress and to ensure the necessary parties are kept informed of the situation, in a timely manner. This policy will be read with the *Risk Management Policy* at the first chapter meeting of each semester.

1. Call emergency personnel
 - a. 911 for an emergency
 - b. 411 to obtain local law enforcement phone number
2. Call Board member¹ (reference chain of command)
 - a. Director will call the insurance company, if necessary
 - b. Director will call the lawyer, if necessary
 - c. Director (preferably the Board President) will be on location as soon as possible, if necessary
3. Members or prospective members should not address the press
 - a. A Representative of the Sorority will address the press, per the sorority's *Media Policy*
4. Should there be any victims due to the situation, the following will be the order of contact to the victim's family:
 - a. Emergency personnel
 - b. A Representative of the Sorority
 - c. Chapter/Colony Representative
5. Members should contact their own parents, family, and friends as appropriate to let them know they are safe.
6. Assemble an emergency chapter/colony meeting
 - a. Have pertinent university officials present (faculty advisor, Greek advisor, etc)
 - b. Have your Chapter Advisor present, if available
 - c. Give fellow sorority members the basics of the incident
 - d. Do NOT write anything down
 - i. This meeting is **not** to "get the story straight"

ii. Wait for the lawyers, if necessary

¹Board of Directors - Chain of Command

December 2017 – August 2018

1. Board President – **Krista May**, cell: (605) 929-0267
2. Board Secretary – **Maryann Fichera**, cell: (561) 313-0333
3. Director of Chapter Services – **Kathryn Bohn**, cell: (916) 281-6437

Event Planning Policy

All Chapters of Alpha Omega Epsilon are required to obtain approval for any event hosted or associated with the Chapter that meet the following criteria:

- Event is located off campus
- Event is open to non-members (e.g. the public or campus, Potential New Members are exempt)
- Events that require the chapter to sign contracts, and/or a third party has been requested to be added to our policy (named insured or additional insured)
- Events that involve alcohol
- Events that are considered “high-risk” (this is at the discretion of the Board Secretary (or delegate)) and is defined in the *Risk Management Policy*, examples include but are not limited to:
 - bungee jumping,
 - parachuting,
 - low ropes courses,
 - athletic events such as boxing and self defense,
 - roof-top functions,
 - water skiing or other water-related activities,
 - and events involving animals.

The process to obtain approval for an activity or event commences when the Chapter submits the Event Planning Form Google Form and any information required based on the questions in that form, to the Board Secretary (or delegate).

The Board Secretary (or delegate) will review the Google Form submission and will make a determination as to whether the event is approved or needs to be forwarded on for further review. The Board Secretary (or delegate) will notify the Chapter of the approval or rejection of the event.

An event is to be considered not approved until notification of approval is received from the Board Secretary (or delegate).

To ensure enough time for event planning forms to be reviewed, additional insureds added, and have been signed off by all approvers, Chapters are strongly encouraged to submit the Google Form 45 days in advance of events. The Google Form submissions are reviewed in order that they are received. Any Google Form submission received less than 14 days from the event will

not be reviewed. The Board Secretary (or delegate) must respond to the Event Planning Form submittal within 14 days of submittal.

Chapters that host activities or events that are not approved by the Board Secretary (or delegate) may place the Sorority at undue risk and may result in disciplinary measures up to and including chapter revocation. In the case of the event being not approved, the Board Secretary (or delegate) will advise the Chapter on additional insurance for the event.

[Event Planning Form](#)

Event Planning Review Procedure

All Chapters of Alpha Omega Epsilon are required to obtain approval for any event hosted or associated with the Chapter that meet the criteria specified in the *Event Planning Policy*.

It is recommended that chapters submit the Google Form for events 45 days prior to the event, but events that are submitted within 14 days of the event will not be reviewed and automatically rejected. The Board Secretary (or delegate) must respond to the Event Planning Form submittal within 14 days of submittal.

The Delegate is responsible for checking the Event Planning Policy Google Form on a bi-weekly basis to review and/or forward on the necessary Event Planning Forms to the Board Secretary. The delegate will do an initial review of all Google Form submissions to determine whether or not the Form needs to be forwarded to the Board Secretary. Any Event Planning Forms that do not include contracts, do not require being named as additionally insured on the insurance and/or events that do not include alcohol can be reviewed and approved by the delegates. All contracts and contact with JRFavor must be handled through the Board Secretary. It is the responsibility of the delegate to provide comments and questions back to the chapter or to ask for additional information before sending documents onto the Board Secretary or before approving the forms herself. Once the form is forwarded to the Board Secretary, it will be her responsibility to handle all future communication with the chapter from that point forward, including informing the chapter of the approval or rejection of the event.

Events including contracts, proof of insurance, alcohol, or similar events must be approved by JRFavor through correspondence with the Board Secretary.

The Board Secretary (or delegate) will review the event planning form and will make a determination as to whether the event is approved or not approved. The name of the reviewer, date of approval and all records must be listed on the Google Form. For events that do not require the Board Secretary's review, the Delegate will notify the Chapter and cc the Board Secretary. For events that do require the Board Secretary's review, the Board Secretary will copy the delegate on all correspondence with the chapter and JRFavor including the final approval or rejection.

Chapters that host activities or events that are not approved by the Board Secretary (or delegate) may place our organization at undue risk and may result in disciplinary measures up to and including chapter revocation. In the case of the event not being approved, the Board Secretary (or delegate) will advise the Chapter on additional insurance for the event.

Flow of Chapter Paperwork

Due on October 15th (Fall Semester) / Due on February 15th (Spring Semester)

Item	Email to:
"Blue Cells" of OTR <ul style="list-style-type: none"> • Officer List for Term • Members List & Statuses • Goals for Semester 	CA, RA, NCA (if applicable) ¹ & office@alphaomegaepsilon.org
Proposed Budget	CA, NCA (if applicable) ¹ & office@alphaomegaepsilon.org

Due on December 15th (Fall Semester) / Due on May 15th (Spring Semester)

Item	Email / Mail (where noted) to:
Dues ⁴	US / Canadian post mailed to Headquarters
Candidate Dues ⁴	US / Canadian post mailed to Headquarters
Signed Risk Management Policies	US / Canadian post mailed to Headquarters ²
On Target Report Draft	CA, RA, NCA (if applicable) ¹ & office@alphaomegaepsilon.org
Candidate Dismissal Forms ³	US / Canadian post mailed to Headquarters ²
Expulsion Forms ³	Board President

Due on January 15th (Fall Semester) / Due on June 15th (Spring Semester)

Item	Email / Mail (where noted) to:
Promissory notes of Initiated Candidates	US / Canadian post mailed to Headquarters ²
Semester Newsletter	Chapters, Alumnae Chapter (if applicable), CA, RA, NCA (if applicable) ¹ & enews@alphaomegaepsilon.org
Finalized Budget	CA, NCA (if applicable) ¹ & office@alphaomegaepsilon.org
On Target Report Finalized	CA, RA, NCA (if applicable) ¹ & office@alphaomegaepsilon.org

Due on June 15th (Spring Semester)

Item	Email / Mail (where noted) to:
Sisterhood Trees	office@alphaomegaepsilon.org

Notes:

1. NCA is only for chapters less than 2 years old.
2. Original copies of the Candidate Dismissal Forms, Risk Management Policies, and Promissory Notes MUST be mailed. Chapters should keep a duplicate copy for their records (electronic is acceptable for duplicate).
3. If a candidate dismissal or expulsion occurs very close to this deadline, please notify the appropriate people that the documentation is on the way. It is expected that any dismissals or expulsions listed on the OTR will have completed documentation
4. Dues owed by the Chapter are determined based on the membership statuses listed on the October 15th and February 15th OTRs.

Foreign Exchange Rate Policy

The purpose of this policy is to detail the creation and use of foreign exchange rates in the countries in which chapters and/or colonies of Alpha Omega Epsilon resides.

Foreign exchange rates will be set by the Board Treasurer during the week of January 2nd of each year using information from the Board's financial institution. The foreign exchange rates will be valid until January 2nd of the following year when new foreign exchange rates will be set. The set foreign exchange rates will be applied to all dues and fees incurred by foreign chapters and colonies (located outside of the United States) throughout the year.

Any dues/fees not paid before the foreign exchange rate changes the following year, must be paid using the foreign exchange rate of the year in which the dues/fees were incurred. The Board Treasurer will keep a continuing accurate record of the foreign exchange rates for each country in which a chapter and/or colony of Alpha Omega Epsilon resides for future reference.

Garden Eternal Policy

In the unfortunate event that a sister of Alpha Omega Epsilon Sorority has passed away, the Board shall respond in the following manner:

If the passed sister is an active, the Director of Chapter Services will investigate the circumstances surrounding the events in order to respond appropriately. She will decide on the actions to be taken and report them to the Board for comments and a vote. Once the decision has been made, the Director of Chapter Services will complete the plan of action. The Director of Chapter Services will then inform the Alumnae Relations Committee chair of the need to change the status on the website to deceased.

If the passed sister is an alumna, the Chair of the Alumnae Relations Committee will investigate the circumstances surrounding the events in order to respond appropriately. She will decide on the actions to be taken and report them to the Board for comments and a vote. Once the decision has been made, the Chair of the Alumnae Relations Committee will complete the plan of action.

The Board will respect the family of the passed sister in limiting the discussion of the circumstances surrounding the events to necessary parties only. Any releases to the Media must be cleared with the family (via the Board per the *Media Policy*) prior to submission.

Actions to consider, but are not limited to:

- Call / Send a sympathy card to the active / alumnae chapter in question.
- Call / Send a sympathy card to the family / significant other of the sister.
- Select a member of the Board to attend the funeral services.
- Send flowers to the family and/or significant other and/or funeral home and/or active / alumnae chapter in question.
- Make a donation to the family's charity of choice and/or the AOE National Foundation.
- Submit an article on the passed sister to the Sorority newsletter, The Angle.
- Wear active pins with ribbons the color(s) of the sister's university.
- Other commemorative events/actions.

Funds for the actions will be submitted to the Board Treasurer for reimbursement using:

- The Director of Chapter Services portions of the budget for postage, printing/copying, or supplies.
- The Chair of the Alumnae Relations Committee portions of the budget for postage, printing/copying, or supplies.
- The non-business- related income to be used for educational purposes.

Honorary Member Policy

Honorary members must be nominated as such by the Active Chapter. The request for honorary membership shall at a minimum state the nominee's name and qualifications for honorary status. The nomination shall be submitted to the Board Secretary for approval by the Board of Directors.

Election to Honorary Status

Honorary Members must fulfill the following requirements:

1. Uphold and exemplify the Ideals and Objectives.
2. Be supportive of women in the engineering and technical science fields.
3. Supports and contributes to the development and growth of the Active Chapters.
4. Be in a professionally acceptable discipline that exemplifies the Ideals and Objectives of Alpha Omega Epsilon, a faculty member, or other influential person related to the Active Chapters.

Honorary Member Privileges

1. May not know the secrets or rituals/traditions of Alpha Omega Epsilon.
2. Will never be required to pay dues.
3. May not be given any voting rights at the Chapter or International level.
4. May attend non-restricted Alpha Omega Epsilon sponsored events at the discretion of the Chapter.
5. May not attend Chapter meetings.
6. May not have members only access to the website at the Chapter or International level.
7. May not receive the Alumnae newsletter (The Angle) and other Alumna correspondence.
8. May join another national or local sorority or fraternity.
9. Honorary membership will not remove or negate any current rights or privileges that the honorary member currently holds within the sorority.

Media Policy

Alpha Omega Epsilon Sorority maintains a policy of honesty and accuracy in its relationship with the news media. Because news media communications influence understanding and perceptions of the Sorority, it is essential that the following procedures be followed in news media contact situations:

- No candidate, active, alumna, volunteer, employee, or Director is permitted to speak with the news media on any Alpha Omega Epsilon Sorority matter, either on or off the record without prior approval from the Chair of the Newsletter Committee.
- All news media contacts received directly by candidates, actives, alumnae, volunteers, employees, or Directors should be referred immediately and without comment to the Chair of the Newsletter Committee. The candidate, active, alumna, volunteer, employee, or Director should take the reporter's name and telephone number and let him/her know that someone from the Sorority's Board of Directors will be getting back to him/her soon.
- The Chair of the Newsletter Committee will determine the Sorority spokesperson for handling each news media contact and brief the individual, as appropriate, prior to the interview.
- Following a media interview, the designated spokesperson will provide a summary to the Board including the nature, content, and impression of the interview. Whenever possible, a Director will be present for the interview.
- The Board is responsible for all news releases, news conferences, statements to the media, and interviews with reporters regarding all Sorority matters. The purpose and content of all statements to the media must be cleared in advance by the Chair of the Newsletter Committee.

Member Discipline

Any Member of any Chapter may be placed under probation at the direction of the Chapter Executive Board with approval of the Chapter Advisor and Regional Advisor or at the direction of the Board of Directors. A member may be placed on probation for violating the oath of membership, for violating the *Risk Management Policy*, for dishonorable or improper conduct, for disloyalty to the Sorority, or for actions that are harmful to the Sorority.

The proceedings for placing a member on probation shall be covered in Chapter Bylaws. The Chapter Executive Board must document the violation, steps to get off of probation and the length of probation. This information is to be approved by the Chapter Advisor and Regional Advisor and then provided in a letter to the member.

A Member under probation shall work to cancel their probation status by serving the Sorority or community for a set project or amount of time as determined by the Active Chapter Executive Board and with approval by the Chapter Advisor. Failure by the Active Member under probation to attempt to revoke the probation status within a predetermined time frame set by the Chapter and Chapter Advisor in the probation letter, will result in the beginning of expulsion proceedings.

Membership Policy

Members

Members of the Sorority include any person who has been elected into membership in the Sorority in accordance with the provisions of the policies and procedures, Initiation Ritual, and has not resigned her membership, or whose membership has not been terminated.

Classifications of Members consist of:

1. Collegiate Students
2. Alumnae
3. Honorary Members.

Member status shall be described in the policies and procedure.

Organization

Members of the Sorority shall be organized into collegiate, alumnae chapters, and alumnae at large to promote the purpose of the Sorority.

Eligibility

Women eligible for membership shall be of good moral character, uphold the Sorority's Ideals and Objectives and meet the requirements for each status of membership.

Obligations of Membership

Every member shall be granted the privileges of the Sorority, and shall assume the obligations thereof, for life.

Vows of sisterhood taken by the initiation ceremony can only be dissolved by death, expulsion from the Sorority, or voluntary resignation.

Membership In Other Organizations

Once initiated as a member of the Sorority, one may not join any other local or national sorority because of the sacred vows taken during the initiation ceremony. Membership in the Sorority precludes membership in any other national social or professional sorority, with the exception of Honorary and exclusive service-oriented fraternities. Requirements for dual membership are in the *Dual Membership Policy*.

1. Alumna Member
 - a. Has graduated or transferred from the college or university where the member was initiated as an active.
2. Honorary Member

- a. A person who has not joined the Sorority as an active.
- b. Upholds and exemplifies the Ideals and Objectives, and is supportive of the mission of the Sorority.

All members must be affiliated with part of an active or alumnae chapter.

Election to Membership

The power to elect candidates shall abide with the Active chapters.

Any Active member may propose membership for any qualified person at any active meeting for which prior notice has been given to all voting members of the chapter of the intent to vote on prospective members. The membership proposal may be made orally and must be supported by at least one other voting member of the chapter. The proposal may be voted on immediately by a membership election vote.

Candidates elected to membership shall be initiated according to the official Sorority Initiation Ritual.

Declaration of Status

Prior to the first active meeting of each term, each member shall be required to state their status to the Chapter Recording Secretary. If a member does not declare a status prior to the first meeting of the term, she is Active-Active. Active dues are based on the status declared at the beginning of the term.

A member may only change her status during the term if approved by a 2/3rd majority vote of the Chapter.

Members who fail to pay their dues and have not expressed the intention to do so, or members who have expressed a desire not to be involved in the active organization after fulfilling the active requirements, shall have their membership status changed to Active-Passive upon a 2/3rd majority vote of the Chapter.

1. The Chapter Executive Board shall notify the member of the vote to change her membership status in writing at least one week prior to the vote. In addition, the Chapter Executive Board shall notify their Chapter Advisor.
2. The Chapter Executive Board shall notify the member of the result of the vote to change her membership status in writing no more than one week after the vote. In addition, the Chapter Executive Board shall forward the results of the vote to their Chapter Advisor.

If the member pays her dues in full, or signs a note of intention to do so, prior to the vote to change her membership status, then the vote to change her membership status will not occur.

The member has the right to work to regain active-active status by working to meet the qualifications of the status.

Member Statuses

Membership shall consist of four distinct statuses: Membership Candidate, Active, Alumna and Honorary member and are defined as the following:

Qualifications for Candidate Status

Candidates for membership shall:

1. Be a registered undergraduate or graduate female student in a college or university in which the Sorority has a collegiate chapter.
2. Be a student in good standing with the University with a minimum cumulative 2.0 out of 4.0 G.P.A. or equivalent, unless she is a first-term freshman.
3. Have successfully been initiated through the Chapter membership ceremony for candidates.
4. Be recognized by the Sorority to be a candidate.
5. Expected to attend all functions and responsibilities set forth by the Actives and campus policies.
6. Is not a member of another national or local sorority.
7. Expresses interest in joining the Sorority.
8. Be of good moral character
9. Exemplify the Sorority's Ideals and Objectives
10. Share the common objective of promoting women in engineering and the technical sciences
11. Support the Sorority's mission of:
 - a. developing and maintaining an environment of support, unity and friendship among sorority members on local and international levels;
 - b. conducting educational activities and programs to enhance the scholastic achievement and advancement of sorority members in engineering and the technical sciences;
 - c. and conducting local and international charitable activities to benefit the communities in which the Sorority and local sorority chapters are active.

A candidate shall not be initiated as an Active Member until payment of the required initiation fee is received by the Board Treasurer. Failure to comply during the Membership Education period could result in invitation withdrawal, as discussed in the *Membership Withdrawal Policy*.

Qualifications for Active Status

To qualify for active status, the candidate must have:

1. Be a registered undergraduate or graduate female student in a college or university in which the Sorority has a collegiate chapter.
2. Successfully completed the Membership Education program as defined in the Membership Education Book.
3. The Chapter vote the candidate to active status via a membership vote and the candidate be initiated to active status by the official Sorority Initiation Ritual.
4. Signed the Risk Management policy and promises to abide by its terms.
5. Signed a Promissory Note and promises to fulfill financial obligations.

Classification - Active Status

The requirements and privileges for active, co-op and passive active members are defined as follows:

1. Active-Active
 - a. Requirements:
 - i. Is enrolled as a student as defined by the Chapter's University.
 - ii. Has paid term active dues or signed a note of intention to do so.
 - b. Privileges:
 - i. Is eligible for full voting rights.
 - ii. Has free participation in Alpha Omega Epsilon sponsored events.
2. Active Co-op
 - a. Requirements :
 - i. Is currently on a work term assignment or studying abroad.
 - ii. Has paid a co-op fee to cover, at a minimum, International dues for the term.
 - b. Privileges:
 - i. Has the right to choose to fulfill the active-active requirements and gain all rights and privileges accordingly.
 - ii. Retains all voting privileges. Active co-ops are exempt from the "two meeting rule" outlined in the *Voting Procedure*, for all votes.

- iii. May attend all Alpha Omega Epsilon sponsored events
- iv. May choose to attend active meetings.

3. Active-Passive

a. Requirements:

- i. Has expressed a desire not to be involved in the active organization after fulfilling the active requirements; or
- ii. Is enrolled in the University sponsored study abroad or co-op and does not wish to retain voting rights.
- iii. Has paid a passive fee to cover, at a minimum, International dues for the term.

b. Privileges:

- i. May attend any restricted events if the chapter votes to allow an individual to attend one of these functions.
- ii. May attend meetings, but she will have no voting privileges.
- iii. May attend non-restricted Alpha Omega Epsilon events.
- iv. She can regain active-active status upon the fulfillment of the active-active requirement.

Election to Alumnae Status

All collegiate members who have transferred, graduated, or are leaving school for any reason must be voted to Alumna-Active or Alumna-Restricted status via simple majority vote.

Responsibilities:

1. Alumnae are responsible for providing the Active Chapter all address changes.
2. Alumnae should be emotionally and financially supportive of their chapter.

Privileges:

1. Alumnae will be kept up to date on all chapter happenings through the Chapter newsletter.
2. The Alumna member may, upon transfer to a school with another Chapter or upon return to school, choose to become an active of that chapter with a 2/3's majority vote and fulfillment of that chapter's active requirements.

Classification - Alumnae Status

A list of all alumnae and their corresponding alumnae statuses must be documented and submitted to the Director of Chapter Services. All alumnae must be notified in writing of their status within one week of the vote by a representative of the active chapter.

A member that has been an active at more than one university due to a university transfer will become an alumna for the chapter in which she spent the majority of her time as an Active-Active or Active-coop member. If the member would like to be considered an alumna from the other chapter, she can submit a petition to the Alumnae Committee to be approved by the Board. The decision of the Board is final.

Alumnae members will be categorized into three categories: Active, Passive, and Restricted. The Board has the right to change the membership status of any alumna member if the alumna member fails to uphold the requirements of her membership status or if the alumna member meets the requirements of another membership status.

1. Alumna-Active

Alumna-Active status is for those members who have fulfilled their obligation to the Sorority or Alumna-Active status is for those members who have been voted to Alumna-Active status by their chapter, have not fulfilled their obligations to the Sorority, but are within three years from their date of being voted to Alumnae-Active status. A member who is Alumna-Active will be considered an alumnae in good standing.

a. Requirements:

- i. Must have paid all dues owed to her Chapter, or signed a letter of intention to do so, prior to vote to Alumnae-Active status
- ii. Must have paid her promissory note within the designated promissory note time frame
- iii. If an Alumnae-Active member fails to completely pay her promissory note prior to the expiration of the promissory note time frame, the Board will change her membership status from Alumna-Active to Alumnae-Passive.
- iv. Must uphold the oath of membership, Ideals and Objectives, the Bylaws, and the *Risk Management Policy*.
- v. Must be emotionally and financially supportive of her Chapter and the Sorority

b. Privileges:

- i. Have public and members-only access to the sorority website
- ii. Receives the Alumna newsletter (The Angle) and other Alumna correspondence
- iii. May serve as a committee chairman

- iv. May serve as a committee volunteer
- v. May run for a Director position provided she satisfies the requirements as stated in Article IV, Section 2 of the Bylaws.
- vi. May vote on Board of Director elections.
- vii. May vote upon Bylaw amendment proposals.

2. Alumna-Passive

Alumna-Passive status is for those members who have not kept up or fulfilled their obligations to the Sorority. Alumna-Passive members will have limited restrictions placed upon them by the Board. Ideally, Alumna-Passive members will work towards fulfilling the requirements of Alumna-Active status.

a. Requirements:

- i. May have outstanding monies owed to her Chapter and/or has not signed a letter of intention to repay outstanding monies
- ii. May not have paid her promissory note in full
- iii. May only be considered Alumnae-Passive for a maximum of three consecutive years
 - 1. The Board will change the status of an alumna-passive member to alumna-restricted status after three consecutive years. The member will be notified in writing of the membership status change and instructions on her rights and privileges shall be provided at her last known address.
 - 2. The Board will change the status of an alumna-passive member to alumna-active if the member has fulfilled the requirements of alumna-active status. The Board shall notify the member of the membership status change and instructions on her rights and privileges shall be provided.

b. Privileges:

- i. Receives the Alumna newsletter (The Angle) and other Alumna correspondence
- ii. May not vote in elections
- iii. May not vote on Bylaw Amendment proposals
- iv. May not run for a Director position
- v. May not be a committee chairman
- vi. May serve as a committee volunteer

- vii. Have public and members only access to the sorority website

3. Alumna-Restricted

Alumna-Restricted status is for those members who have left school, either due to graduating or for some other reason, and have not been granted Alumna-Active membership status. Or Alumna-Restricted status is for those members who have not fulfilled their obligations to the Sorority for at least three consecutive years. Ideally, Alumna-Restricted members will work to fulfill the requirements of Alumna-Active status.

a. Requirements:

- i. May have outstanding debt owed to her Chapter or the Board
- ii. May have not paid her promissory note
- iii. May not have been granted Alumna-Active membership status upon leaving school by her Chapter and the Board.
- iv. May have had her membership status changed from Alumna-Passive to Alumna-Restricted by the Board, as defined in Alumna-Passive, above.
- v. If they have fulfilled all the requirements of Alumna-Active status, they
- vi. May petition the Board to return to Alumna-Active status.
 - 1. Board must take into consideration chapter active and alumnae recommendations prior to reinstating alumna active status
- vii. May have failed to uphold the oath of membership, Ideals and Objectives, the Bylaws, or the *Risk Management Policy*, or other duties and obligations to the Sorority

b. Privileges:

- i. May not receive the Alumna newsletter (The Angle) and other Alumna correspondence
- ii. May not vote in elections
- iii. May not vote on Bylaw amendment proposals
- iv. May not run for a Director position
- v. May not be a committee chairman
- vi. May not be a committee volunteer
- vii. May not have members only access to the sorority website

Chapters can inform the Board of any Alumna's meeting or not meeting Alumna requirements. Chapters can make recommendations of change of Alumna

status to the Board. Information and recommendations will be reviewed by the Board in a timely manner.

Membership Withdrawal Procedure

Candidate Dismissal

Any Active Member, at a regular meeting of the chapter, may move the withdrawal of an invitation to membership for reasons involving dishonorable conduct, consistent scholastic failure, lack of interest in the Sorority, or damage to the Sorority.

1. The vote on the motion shall take place at the next regular meeting of the chapter, with all Active Members having been notified by phone or writing prior to the meeting as defined in the Chapter Bylaws and in accordance with the *Voting Procedure*.
2. The notification to the candidate of the motion is at the chapter's discretion.
3. The motion to withdraw a candidate's invitation to membership is passed if 10% of the members present vote "yes." If the motion passes, proceedings are initiated to withdraw an invitation to membership as outlined below.

If a membership candidate cannot fulfill the requirement for initiation, due to the above vote by the Chapter to withdraw a candidate's invitation to membership, not passing the membership election vote, or if the candidate no longer expresses interest in joining or is no longer able to join the Sorority, that person shall be dropped from the roll. The procedure for withdrawal of an invitation for membership shall be conducted as follows:

1. The candidate is informed in writing of the chapter's decision to withdraw the invitation to membership and is given one week to submit a written appeal of the decision.
2. The vote on the appeal shall take place at the next chapter meeting or meeting specially convened by the Chapter President, with all Active Members having been notified in accordance with the *Voting Procedure*.
3. A motion for reinstatement of the candidate is passed if more than 90% of the members present vote "yes". This will reinstate the candidate's status including all rights prior to the procedure to withdraw the invitation to membership.
4. A candidate may only appeal once. If the candidate is reinstated and does not pass a subsequent membership election vote, that vote is final.
5. Upon withdrawal of an invitation for membership, a dismissed candidate forfeits the following: AOE candidate pin, all AOE privileges and all AOE materials.
6. A dismissed candidate cannot duplicate AOE policies, materials and procedures or imitate AOE actions and traditions.
7. A dismissed candidate shall sign a promissory note for outstanding debts, if any, and a written agreement to secrecy shall be signed.

Candidate Dismissal Agreement

Expulsion

Any Member of any Chapter may be expelled from the Sorority under extreme circumstances for violating the oath of membership, for violating the *Risk Management Policy*, for dishonorable or improper conduct, for disloyalty to the Sorority or for actions that are harmful to the Sorority.

Expulsion proceedings for a member shall be considered as follows:

1. An Active member may bring signed charges in writing against the member in question to the Chapter President, who shall immediately notify the Chapter Advisor of the charges, present the charges to the Sister being charged, and read them at the next regular meeting of the chapter;
2. The Chapter President shall appoint a member of the chapter to conduct the prosecution. The member bringing the charges shall act as the prosecuting witness.
3. The accused member may select two members of the chapter to conduct the defense.
4. The accused member shall be tried not sooner than at the next regular meeting following that at which the charges were read. The Chapter Recording Secretary shall notify in writing, every member of the chapter of the time, and occurrence of the trial. The Chapter President shall preside at the trial, unless she is the accused, in which case, the Chapter Vice-President shall preside.
5. After the evidence has been heard, all the Active Members of the Chapter who are present shall vote by secret ballot for acquittal or conviction. A $\frac{3}{4}$'s vote of all Active Members of the Chapter for conviction result in a recommendation for expulsion.
6. Immediately following a vote which recommends expulsion, the Chapter Recording Secretary shall send the proceedings to the Board President, with a copy to the Chapter Advisor. The Board President shall summarize the proceedings and request the Board to approve or disapprove them. The action of the Board shall be final.
7. Should the Board determine via written complaint and documented follow-up that a member is in violation of the *Risk Management Policy*, the Board may by unanimous vote expel a member of any status of the sorority without proceedings 1-6 above.

No member shall be tried twice for the same charge.

The Board Treasurer shall offer to purchase at the current list price and with Board funds, the pin of an expelled member.

The name of each expelled member with a statement of the cause of expulsion shall be published in the meeting minutes of the Board.

Upon expulsion, a member forfeits the following: AQE activation pin; all AQE privileges; and all AQE materials.

An expelled member cannot duplicate AOE policies, materials and procedures or imitate AOE actions and traditions.

An expelled member shall sign a promissory note for outstanding debts, if any, and a written agreement to secrecy shall be signed.

Active Member Expulsion Agreement

Voluntary Dismissal

A member may initiate a voluntary resignation of their obligations of membership by requesting a Request for Resignation form from their Active chapter of initiation, the Chapter Advisor or Regional Advisor associated with the Active chapter of their initiation or directly from the Board. The form must be completed and submitted per its instructions.

Voluntary resignation by a member does not relieve or release her from financial obligations incurred while still a member, including the promissory note. All outstanding debts, including the promissory note, must be settled prior to approval of the request for voluntary resignation.

The Board of Directors approves voluntary resignation requests.

Once a member's request to voluntarily resign is approved, it is final. Members who have voluntarily resigned are prohibited from seeking re-admittance into Alpha Omega Epsilon.

Names of members who have voluntarily resigned shall be published in the next meeting minutes of the Board.

Members who have voluntarily resigned forfeit the following: Alpha Omega Epsilon activation pin; all Alpha Omega Epsilon privileges; and all Alpha Omega Epsilon materials.

Members who have voluntarily resigned are prohibited from duplicating Alpha Omega Epsilon policies, materials and procedures and imitating Alpha Omega Epsilon actions and traditions.

Members who have voluntarily resigned must sign a written agreement to secrecy.

Voluntary Resignation Request

New Graduate Policy

At graduation time, the Active Chapters of Alpha Omega Epsilon are required to give their new alumnae a copy of the **Alumnae Brochure**. This **Alumnae Brochure** congratulates the new alumnae, provides information on current Alumnae Chapter and Interest Groups, how to pay the promissory note, volunteering opportunities, and Alumnae Status descriptions. The Alumnae Brochure can be found on the website or obtained by contacting the Director of Chapter Services.

The Alumnae Committee, is required to email new graduates of the Active Chapters of Alpha Omega Epsilon a **New Graduate Packet**. The list of graduates for each Active Chapter is obtained from the Director of Chapter Services. The Director of Chapter Services retrieves this information from the Active Chapters' on target reports each semester. If an on target report is missing, the Director of Chapter Services will attempt to contact the president of the Active chapter to obtain this information. Email addresses of the graduates are also retrieved from the on target report.

The purpose of the **New Graduate Packet** is to inform the alumnae of available opportunities to stay involved with the sorority, networking options and social clubs available to alumnae, and general information about the current volunteers. These graduate packets shall include: committee descriptions, current Directors, Alumnae Chapter resources, and website links. The promissory note information is sent separately and is handled by the Promissory Note Committee under the Treasurer.

Graduate packets shall be emailed on April 1st and September 1st. By providing a delay of approximately three months after graduation, the new graduates are able to get settled in their new locations and better able to assess their availability and desire to participate in Board volunteer activities. The graduate packet document is kept by the Director of Chapter Services. This document is reviewed on an as per needed basis by the Board.

Promissory Note Policy

The promissory note is a one-time payment made by alumnae that provides for ongoing communication between the Sorority and alumnae over a lifetime, contributes to the growth of the Sorority, and assists in the financial stability of the Sorority.

The Board sets the value of the promissory note and may change its value to maintain the financial integrity of the Sorority.

The Board shall provide a minimum of one year's notice of any changes to the promissory note value.

The promissory note is made payable to Alpha Omega Epsilon Sorority and is submitted to the Board Treasurer.

The promissory note is not tax-deductible.

The current value of the promissory note is listed in the *Schedule of Dues and Fees*.

Promissory notes must be signed at active initiation by all candidates. The Chapter Membership Educator and/or Board Treasurer shall educate all candidates about the promissory note prior to active initiation.

Signed original promissory notes are to be mailed to the Board Treasurer each term postmarked no later than June 15th for the January 1 – June 30 term and January 15th for the July 1 – December 31 term. Failure to send in the signed original promissory notes by the aforementioned dates may result in a fine and/or Chapter probation at the discretion of the Board. Copies of the signed promissory notes should be kept by the Chapter Treasurer.

A one-time payment worth 3% of each fully-paid promissory note will be returned to the Chapter from which the Alumna is a member. The Chapters will receive their reimbursement from the Board Treasurer postmarked no later than March 15th each year for payment of fully-paid promissory notes received the previous calendar year. International Chapters pay their promissory notes in US dollars, so they will receive their reimbursement in US dollars. If there is no active Chapter, the full amount is kept by the Sorority. In the case of active Chapter probation the Sorority will not release funds until probation has been lifted at which point in time the held amount will be released in its entirety to the Chapter.

Alumnae who were initiated as Active members after the inception of the Promissory Note program who fail to pay their promissory notes in full within the designated promissory note timeframe will result in change of Alumna status to Alumna-Passive and, in extreme cases, their respective Chapters may be placed on probation. Extreme cases being defined as:

1. If Chapters fail to or refuse to administer the promissory note program as defined;
2. If Chapters consistently fail to turn in signed promissory notes as defined;
3. If Chapters do not include the promissory note system in their membership education as defined;

4. If Chapters, or any Chapter member, encourage(s) any Alumna(e) to not pay the promissory note to the Sorority for any reason.

The Board is obligated to educate Colonies/Chapters about the promissory note and promissory note funds disbursement.

Charter members are forgiven a portion of their promissory note as detailed in the *Schedule of Dues and Fees*. The Board sets this value to maintain the financial integrity of the Sorority and must give one year's notice of any change in this value.

[Promissory Note Agreement](#)

[Promissory Note Agreement - Founders](#)

Publications Policy

Alpha Omega Epsilon maintains a policy of professionalism in its publications. The purpose of this policy is to accurately define the behaviors required when printing materials that may contain the name, letters, logo, crest or associations to Alpha Omega Epsilon.

Active members, honorary members, initiated prospective members and alumnae of Alpha Omega Epsilon are encouraged to represent their association to the Sorority by displaying and wearing merchandise that marks such involvement. However, in associating oneself to the Sorority, members and prospective members accept the responsibility of properly representing a positive image and upholding the *Risk Management Policy* at all times.

This policy is meant to comply with and complement all existing policies and guidelines as well as the Bylaws.

General Guidelines

The following guidelines are to be upheld at all times when displaying images that represent Alpha Omega Epsilon:

1. Images of Alpha Omega Epsilon include:
 - a. the crest
 - i. Shield Only [Image 1]
 1. Sun & Rings – Yellow (R=255, G=255, B=1)
 2. Background Clouds – Light Grey (R=204, G=204, B=204)
 3. Foreground Clouds – Dark Grey (R=177, G=177, B=177)
 4. Shield – Royal Blue (R=39, G=0, B=117)
 5. Vine – Green (R=4, G=153, B=53)
 - ii. Full Crest (shield and banner) [Image 2]
 1. Colors are the same as above
 - b. the logo
 - i. All logo variations should be in Royal Blue (see below for color guidelines). White and Silver may also be used if the background is dark. When color is not available, black may be used for all elements.
 - ii. The typeface for the Script portion of the logo is Black Jack.
 - iii. Box and Script Logo [Image 3]
 - iv. Box Logo [Image 4]

- v. Script Logo [Image 5]
 - vi. Horizontal Logo [Image 6]
 - vii. Rose Logo [Image 7]
- c. the colors
- i. Royal Blue (Pantone® 280 or RGB = 9, 52, 122)
 - ii. Silver (Pantone® 877 or RGB = 143, 143, 140)
 - iii. White (RGB = 255, 255, 255)
- d. the greek letters
- i. ΑΩΕ
- e. the name
- i. Nickname: A.O.E.
 - ii. Greek Shorthand: ΑΩmegaΕ
 - iii. Written form: Alpha Omega Epsilon
2. Images of Alpha Omega Epsilon should be accurately displayed. The image should not be distorted and should be legible on all items.
 3. When documenting the name, ΑOE (with no periods) should NOT be used.
 4. The Nickname, A.O.E., and Greek Shorthand, ΑΩmegaΕ, should not be used on any apparel.

Apparel and printed publications should not utilize images that the purchasing party does not own or have the right to distribute. This includes, but is not limited to, copyrighted and trademarked images.

1. Copyright is a property law that protects original works of authorship. Trademark protects words, phrases, symbols, or designs identifying the source of the goods or services of one party and distinguishing them from others.
2. The 1976 Copyright Act gives the owner of copyright exclusives rights of, including but not limited to, reproducing the work in copies, preparing derivative works based on the work, and distributing copies of the work. It is illegal for anyone to violate the rights provided by the copyright. (<http://www.copyright.gov/>)
3. The Lanham (Trademark) Act of 1946 prohibits a number of activities including trademark infringements, trademark dilution and false advertising (<http://www.uspto.gov>)
4. The purchasing party assumes all responsibility of upholding copyright and trademark laws.

5. It is advised that the purchasing party work with printing company to avoid regulations of copyright and trademark images. The printing party may also use images that have been declared as public domain.
6. All apparel and printed publications should comply with the guidelines outlined in the Risk Management Policy.

Apparel Guidelines

Apparel, as referenced in this policy, refers to but is not limited to t-shirts, tote bags, hats, pants, or active wear. Since apparel with printed images of Alpha Omega Epsilon influences the perception of the Sorority it is essential that the following guidelines and procedures be followed:

Non Members

1. Non members are prohibited from acquiring and wearing apparel that contains ONLY the name, letters, logo, crest or associations to Alpha Omega Epsilon. A singular image of those items indicates sisterhood within Alpha Omega Epsilon
2. Non members may acquire and wear apparel that contains the written form or greek letters of Alpha Omega Epsilon in association to an Alpha Omega Epsilon sponsored event, fundraiser, joint event, Greek organization etc. In these cases, the printed apparel should make reference to the event. (For example, non members are allowed to wear t-shirts for an Alpha Omega Epsilon sponsored 5K run.) When possible, members should try to limit use of any association with Alpha Omega Epsilon to non members. If using the name is necessary, the written form should be used if possible, using the greek letters as a last resort option.

Candidates

1. Those initiated through the Candidate Initiation Ceremony may wear either the written form, "Alpha Omega Epsilon" (including the Script Logo Image 5) or the Rose Logo Image 7 ALONE (i.e. without "Candidate").
2. Those initiated through the Candidate Initiation Ceremony may NOT wear the Greek letters, logo (all variations except the Script Logo and Rose Logo), or crest until they are initiated as an active sister.
3. Those initiated through the Candidate Initiation Ceremony may wear apparel which is appropriate for non members.

Colony Members

1. Those initiated through the Candidate Initiation Ceremony may wear either the written form, "Alpha Omega Epsilon" (including the Script Logo Image 5) or the Rose Logo Image 7 ALONE (i.e. without "Colony").
2. Colony founders (Alpha Class members) may wear the Greek letters or Logo Images 3, 4, and 6, as long as "Colony" is also on the apparel visible and near the main body of work on the piece of merchandise.

3. Colony members who join after the primary class (Beta Class members and forward) may only wear the Greek Letters or Logo Images 3, 4, and 6 AFTER they have finished the candidate requirements.
4. Under no circumstances shall colony members use the crest image for merchandise.

Members

1. Members initiated through the active initiation ceremony and have not been expelled qualify to wear the written form, Greek letters, logo, or crest.

All apparel which includes more than only the name or greek letters of the Sorority must be approved by the Merchandise Committee in accordance to the following procedure:

1. Proofs for all apparel must be submitted via email to the Merchandise Committee prior to purchase (merchandise@alphaomegaepsilon.org).
2. The Merchandise Committee volunteer will review all proofs.
3. The Merchandise Committee volunteer will communicate approval/disapproval of the apparel within 1 week of receiving the proof.
4. The submitting party is responsible for making any necessary alterations and submitting the proof until approval, allowing 1 week deadline between each new proof submission.
5. The submitting party assumes all responsibility of the accuracy of the apparel once the proof has been approved.
6. Apparel that is made during an Alpha Omega Epsilon sponsored craft activity does not need to adhere to the approval procedure. However, these items are not exempt from the regulations in this policy.

Printed Publications Guidelines

Printed publications, as referenced in this policy, refer to but are not limited to flyers, brochures, banners, and posters. The following guidelines should be upheld when displaying and distributing printed publications:

1. Original digital images of the crest and logo should be obtained by the printing party from the Merchandise Committee. This is to maintain the accuracy of these images. Using other sources of these images may lead to distortion and misrepresentation of the Sorority.
2. The printing party may also obtain the accurate colors of the Sorority from the Merchandise Committee.
3. Printed Publications should not include details of the Sorority's traditions, secrets, and rituals including, but not limited to, Day Away, Ritual Week, and Initiation Ceremonies.

4. The printing party assumes all responsibility in matters of obtaining approval from the facility, such as school buildings, where the printed items will be displayed and/or distributed.
5. The printing party assumes all responsibility of approving and properly representing the Sorority in all printed publications.
6. The Board of Directors has the right, at any time, to review any printed publications and to use corrective actions, as deemed appropriate by the Board, in cases where publications are abused and misrepresent the Sorority.

If a violation of the defined policy occurs, the Sorority asks that publication and distribution of the improper merchandise is immediately stopped by the printing party. The printing party has 48 hours to resolve the violation.

If a member or prospective member notices a violation to this policy, she should contact the violating printing party's Risk Management Chair. If the printing party disagrees with the charges brought against them, they may appeal to the Board of Directors.

If corrective action is not taken within 48 hours, the Risk Management Chair will notify the Merchandise Committee. The Chair of the Merchandise Committee will contact the party directly in an attempt to correct the violation. Failure to acknowledge and take action on the Merchandise Committees' notice within 48 hours will result in review by the entire Board of Directors. If deemed dishonorable conduct by the Board of Directors, consequences will be left to the discretion of the board. The decision of the Board of Directors is final.

Appendix A: Images

- Shield Only [Image 1]



- Full Crest (shield and banner) [Image 2]



- Sun Logo Color [Image 3]



- Sun Logo Black & White [Image 4]



- Script Only Logo [Image 5]

Alpha Omega Epsilon

Record Retention Policy

Purpose

As an Sorority that is accountable to multiple parties, certain records must be retained for a specified length of time while others are to be maintained for as long as the Sorority exists based on the type of record or document it is. This policy provides criteria and direction for maintaining, tracking, and disposing of any Alpha Omega Epsilon related documentation and records. All members, volunteers, and paid staff of Alpha Omega Epsilon are responsible for adhering to and following this policy.

This policy is broken down by Sorority level - Board of Directors, Chapter, etc - to identify direct responsibilities based on the individual's role(s) within the Sorority.

Policy

A document or record is evidence a transaction occurred. To comply with federal and state laws, all records are to be maintained according to a set schedule. Some records are to be kept for a specified length of time at minimum by regulation.

If the record is not listed in one of the tables in this policy, it does not necessarily need to be kept. Maintaining or keeping the record is up to personal or group discretion.

If the record is listed in one of the tables in this policy, please keep the record for the amount of time listed in the table. Some records will need to be kept on file permanently meaning they will need to be stored as to be accessible at any time in the future. These can never be destroyed.

If the record is listed in one of the tables in this policy and has surpassed the length of time we needed to retain the record, you may dispose of the record accordingly. Any physical document that contains personal identifying information (see ...) should be securely destroyed to where no personal information is left accessible or available for others to see. Examples would be personally shredding, secure shred by a supplier, etc.

Please refer to the following tables for retention requirements. Records are grouped referencing if they are for the International level or the Chapter level.

International Level: Board of Directors

For documents and records that are received and maintained at the international level, please use the following tables for the appropriate timelines (maintaining versus properly disposing of said documentation).

Correspondence and Reports

<i>Record Type</i>	<i>Maintain (for)</i>	<i>Responsibility of</i>
Official Convention Materials	Permanently	Convention Chair
General Correspondence	3 Years	All
Meeting Minutes – all boards, committees	Permanently	Board Secretary

Chapter Term Reports	Permanently	Director of Chapter Services
Chapter Audit Paperwork	Permanently	Audit Chair

Financial Records

<i>Record Type</i>	<i>Maintain (for)</i>	<i>Responsibility of</i>
Accounts Payable Ledgers	7 Years	Board Treasurer
Accounts Receivable Ledgers	7 Years	Board Treasurer
Audit Reports	Permanently	Board Treasurer
Bank Reconciliation	7 Years	Board Treasurer
Cash Books – Income Receipts	Permanently	Board Treasurer
Checks Canceled	7 Years	Board Treasurer
Expense Reports	7 Years	Board Treasurer
Bank Statements	Permanently	Board Treasurer
Invoices – to chapters, members	7 Years	Board Treasurer
Invoices – from suppliers	7 Years	Board Treasurer
Tax Returns	Permanently	Board Treasurer

Legal Documents

<i>Record Type</i>	<i>Maintain (for)</i>	<i>Responsibility of</i>
Contracts & Leases – expired	7 Years	Board President
Insurance Policies – expired	Permanently	Board President
Insurance Records – reports, claims, etc.	Permanently	Board President
Legal Documents and Filings	Permanently	Board President

Proposal and Voting

<i>Record Type</i>	<i>Maintain (for)</i>	<i>Responsibility of</i>
Proposal Votes by Mail – Ballots	6 Months	Governance Chair
Proposal Votes at Convention – Ballots	6 Months	Governance Chair
Election Votes by Mail – Ballots	6 Months	Elections Chair

Election Votes at Convention - Ballots	6 Months	Elections Chair
Submitted Proposals	2 Years	Governance Chair
Passed Proposals	Permanently	Governance Chair

Chapter Level: Active and Alumni Chapter Members

For documents and records that are received and maintained at the chapter level, please use the following tables for the appropriate timelines (maintaining versus properly disposing of said documentation).

Correspondence and Reports

<i>Record Type</i>	<i>Maintain (for)</i>	<i>Responsibility of</i>
General Correspondence	3 Years	All
Meeting Minutes – all boards, committees	Permanently	Chapter Secretary

Financial Records

<i>Record Type</i>	<i>Maintain (for)</i>	<i>Responsibility of</i>
Budgets	7 Years	Chapter Treasurer
Yearly Financial Audit	7 Years	Chapter Treasurer
Cash Books – Income Receipts	Permanently	Chapter Treasurer
Checks Cancelled	7 Years	Chapter Treasurer
Expense Reports	7 Years	Chapter Treasurer
Bank Statements	Permanently	Chapter Treasurer
Invoices – to chapters, members	7 Years	Chapter Treasurer
Invoices – from suppliers	7 Years	Chapter Treasurer
Tax Returns	Permanently	Chapter Treasurer

Legal Documents

<i>Record Type</i>	<i>Maintain (for)</i>	<i>Responsibility of</i>
Contracts & Leases – expired	7 Years	Chapter President
Legal Documents and Filings	Permanently	Chapter President

Proposal and Voting

<i>Record Type</i>	<i>Maintain (for)</i>	<i>Responsibility of</i>
Proposal Votes by Mail – Ballots	6 Months	Chapter Secretary
Proposal Votes at Convention – Ballots	6 Months	Chapter Secretary

Risk Management Policy

Introduction

The Alpha Omega Epsilon risk management policies are intended to assist the Sorority in reducing exposure to risks and losses by increasing risk awareness among our chapters, colonies, and members. The Sorority will provide educational assistance to help chapters, colonies, and members establish sound risk management practices that will minimize their exposures.

Alpha Omega Epsilon members are the future of the engineering profession. Therefore, the Sorority is dedicated to developing the intellectual, leadership, and professional skills needed to maximize their potential and strive for their personal best. We are very proud of the professional nature of our Sorority. We expect that our chapters, colonies and members will address the area of risk management in an equally professional and proactive manner. Our chapters, colonies, and members must evaluate their operations in each of these areas and respond with positive and responsible actions to reduce risk and prevent losses.

Compliance with our policy stresses the individual responsibility of each Alpha Omega Epsilon member and collectively their chapter or colony. It is to be followed in addition to any host institution policy requirements.

WARNING: Failure to abide by the Sorority's Risk Management Policy will result in the loss of any insurance coverage that may otherwise be available under the Sorority's insurance. Failure to abide by the Risk Management Policy may also result in the following:

- Placement of a chapter or colony on probation
- Suspension or revocation of a Chapter's Charter and/or prolongation of colony status or colony disbandment.
- Placement of an individual member of the Sorority on probation
- Expulsion of a member from the Sorority
- Denial of initiated membership to a candidate

Risk Management Policy Awareness

- Upon association, each member shall be advised of and provided with a copy the Sorority's risk management policy.
- Each chapter and colony shall review the risk management policy at the first chapter or colony meeting of each school term, and shall record the risk management policy review in the minutes of that meeting.
- A copy of this policy shall be posted on the Sorority and chapter / colony websites.
- A copy of this policy shall be posed at the door of all events.

- A copy of this policy shall be published annually in the Sorority newsletter.

Alcohol and Drugs

The Sorority will take responsible and good faith measures to assure that our members abide by law and policy and that our actions reflect in a positive way on ourselves and on Alpha Omega Epsilon. As stated earlier, none of these actions can provide an adequate substitute for personal responsibility for risk on the part of those who opt to consume or to provide alcoholic beverages.

1. The possession, use and/or consumption of alcoholic beverages, while at any Sorority event, whether local, regional, provincial, national, or international in scope; or in any situation sponsored or endorsed by any chapter, colony, or alumnae chapter, or by the Sorority, or at any event an observer would associate with the Sorority must be in compliance with any and all applicable laws of the country, state, province, county, city, or institute of higher education.
2. No alcoholic beverages may be purchased through or with chapter or colony funds nor may the purchase of alcoholic beverages for members or guests be undertaken by anyone in the name of or on behalf of Alpha Omega Epsilon.
3. The purchase or use of a bulk quantity or common source of alcoholic beverage, for example kegs or cases, is prohibited.
4. No member individually or collectively, shall purchase for, serve to, or sell alcoholic beverages to any minor (i.e. those under the legal drinking age).
5. Under no circumstances may an Alpha Omega Epsilon collegian or alumna act as the server of alcohol at an event.
6. The possession, sales and/or use of any illegal drug or controlled substance at any Sorority event or any event an observer would associate with the Sorority is prohibited.
7. No Sorority chapter or colony may co-sponsor or co-finance an event where alcohol is purchased by any host chapter, group or organization.
8. Open Sorority-sponsored events where alcohol is present are prohibited. Open events are those at which non-members are provided unrestricted access without specific invitation.
9. When alcohol is served at Sorority events, the service of alcohol must be conducted on cash bar basis utilizing the services of a properly licensed and insured company providing professional bartender services.
10. No chapter or colony may co-sponsor an event with an alcohol distributor or tavern (tavern is defined as an establishment generating more than half of annual gross sales from alcohol) at which alcohol is given away, sold or otherwise provided to those present. This includes any event held in, at or on the property of a tavern as defined above for purposes of fundraising. However, a chapter or colony may rent or use a room or area in a tavern as defined above for a closed event held within the provisions of this policy, including the use of a third party vendor and guest list. An event at which alcohol is present may be

conducted or co-sponsored with a charitable organization if the event is held within the provisions of this policy.

11. The following general provisions apply:

- a. Reasonable precautions will be taken by the alcohol service providers and host chapters to prevent the excessive consumption of alcohol and to prevent the service of alcohol to underage persons by anyone.
- b. Members or guests who arrive at an event in an intoxicated state will not be permitted to attend.
- c. At each event, there shall be designated non-drinking members.
- d. Ample non-alcoholic beverages shall be provided at each event.
- e. The service of alcoholic beverages shall end at a specific time which shall be established and clearly published in advance of the event.
- f. No "drinking games" shall be permitted.
- g. It is recommended that events which include alcohol not be held on two consecutive days.

12. The following apply to recruitment events / events with candidates / chapter / colony membership events:

- a. All recruitment activities and contacts associated with any chapter or colony, either formal or informal, will be substance-free. Recruitment activities associated with any chapter or colony may not be held at or in conjunction with a tavern or alcohol distributor as defined in this policy.
- b. No alcohol shall be present at any candidate program, activity, or ritual of the chapter or colony. This includes, but is not limited to activities associated with bid night, big sister – little sister events or activities, "family" events or activities and initiation.
- c. There shall be no alcohol permitted at any event specifically planned for candidates.

Hazing

"HAZING" refers to any activity expected of someone joining a group (or to maintain full status in a group) that HUMILIATES, DEGRADES or risks EMOTIONAL and/or PHYSICAL HARM, regardless of the person's willingness to participate.

"Hazing" may include but is not limited to the following: binge drinking and drinking games; personal servitude; sleep deprivation and restrictions on personal hygiene; yelling, swearing and insulting new members/pledges individually or collectively; inappropriate consumption of any substances or smearing of such on one's skin; brandings including the use of markers; physical beatings; paddling in any form; creation of excessive fatigue; physical and psychological shocks; sexual stimulation and sexual assault; kidnapping and blindfolding; being forced to wear apparel

which is embarrassing, humiliating, or not morally in good taste; quests; treasure hunts; scavenger hunts; morally-degrading or humiliating games and activities; engaging in public stunts and buffoonery; road trips; and/or any other activity which is inconsistent with academic achievement, fraternal, college, or university policy, or applicable city, county, state, province, tribal, federal, or country law.

Contractual Agreements & Additional Insureds

No chapter, colony or member, may enter into any written or oral contract or financial agreement using the name of Alpha Omega Epsilon Sorority. This includes without limitation such agreements as leases, contracts, hold harmless agreements, liability releases, account statements, purchase orders, and hotel or banquet contracts. As the Sorority's insurance does not afford protection for outside parties, no chapter, colony or member may enter into any written or oral agreement under which the responsibility or liability of some party other than the Sorority is assumed. Additional Insured status under the Sorority's insurance requires the prior agreement of both the Sorority and its insurers.

Automobiles and Transportation

To minimize our exposures to automobile related claims, the Sorority strongly recommends that hired transportation (i.e. bus, limousine, taxi) be used when transportation is necessary for Sorority events or activities. We also recommend against "Safe" or "Designated Driver" programs because while they are well intentioned, they present significant claims potential.

Any individual who drives or provides transportation in conjunction with Sorority activities shall obey all applicable motor vehicle laws, including, those concerning vehicle safety, vehicle operation, financial responsibility, and the transportation and consumption of alcoholic beverages. Operators shall ensure that vehicles are properly maintained, and are operated in a safe manner. Rental vehicles shall be operated in accordance with rental contracts.

Use of personal vehicles shall be strictly voluntary and the sole responsibility of the vehicle owner/operator. Financial Responsibility laws generally impose responsibility for accidents on the Driver or Owner of vehicles. The Sorority assumes no responsibility or liability and provides no insurance to Drivers or Owners of vehicles for accidents or injuries, or for any damages to vehicles not owned by the Sorority that may be used in conjunction with Sorority activities.

Sexual Harassment, Abuse, or Misconduct

The Sorority will not tolerate or condone any form of abusive behavior on the part of its members, whether physical, mental, or emotional. This includes any actions that are demeaning to women or men, including but not limited to date rape, gang rape, verbal harassment, discriminatory slurs, unwelcome sexual advances or comments, harassment of any kind, or any jokes, remarks or conduct that creates a hostile environment.

Members Personal Property

Use of personal property in Sorority activities shall be strictly voluntary and the sole responsibility of the owner. The Sorority assumes no liability or responsibility for any loss or damage to any personal property of members even if used in conjunction of Sorority activities.

Weapons, Firearms, and Personal Protection Items

For the safety of its members and guests, no Sorority member or guest may carry a weapon or firearm of any kind while conducting Sorority business, and/or acting on behalf of, or attending any event in the name of the Sorority.

Personal protection items such as pepper spray, alarms, or whistles may be carried and used if needed.

High-Risk Events

Chapters cannot afford the exposure of sponsoring, organizing, endorsing or participating in events or activities which involve a high-risk of physical injury or damage to property. While no definitive list of such events can be given, Chapters must take a common sense approach to evaluating the risk of a particular event or activity. Examples of high-risk events include, but are not limited to the following: bungee jumping, parachuting, low ropes courses, athletic events such as boxing, roof-top functions, water skiing or other water-related activities, especially those activities which related to any type of temporary pool or water slide.

Risk Management Violations

Violation of Alpha Omega Epsilon Bylaws or other Sorority policy, failure to implement plans as approved or failure to observe the prescribed planning procedures may result in disciplinary action up to and including revocation of a chapter and/or individual member disciplinary action up to and including expulsion.

[Risk Management Support Form](#)

Ritual and Badge Policy

Ritual

The official Rituals of the Sorority shall be secret and shall include the procedures for initiation of candidates, installation of chapters, opening and closing of Board, convention and Active chapter meetings, installation of officers and all other ceremonial procedures of the Sorority.

A fine shall be levied against any chapter or member of the Sorority responsible for the loss of a copy of a ritual or for a loss of any section of a ritual. The penalty shall be left to the discretion of the Board. A Chapter shall not create electronic copies of rituals provided by the Board.

Badge

1. Candidate Pin

- a. The candidate pin is in the shape of a parallelogram with a royal blue background and a silver rose on it. The pin is to be worn by every membership candidate of Alpha Omega Epsilon in plain view on the left side above the heart. Upon activation, the candidate surrenders the pin to the sisters as a sign of the completion of all qualifications.

2. Active Pin

- a. Every sister of AΩE shall receive an active pin in the shape of a parallelogram with a royal blue background and "AΩE" written on it.
- b. The active pin may only be worn by a member of Alpha Omega Epsilon.

2. Special Jewelry

- a. Jewelry may be engraved but it is not a requirement nor is it completed automatically by the Sorority.
- b. Persons that have been deemed worthy by the Chapter to support the Ideals and Objectives of Alpha Omega Epsilon may receive a separate piece of jewelry from the candidate pin and active pin. This piece of jewelry simply serves to recognize the individual's devotion to the Ideals and Objectives of Alpha Omega Epsilon without bestowing any additional rights or responsibilities.
 - i. Potential worthy individuals should be nominated by any active or alumna sister. The Chapter may discuss the nominees. The nominee is then voted upon by the active Chapter using a secret vote in which 90% of the votes are needed to be accepted as a worthy individual that will uphold the ideals and objective of Alpha Omega Epsilon.

Symbols

1. *The Colors* - Royal blue, silver and white.

2. *The Flowers*

- a. Candidate - White Carnation.
- b. Active - White Rose.
- c. Alumnae - White Calla Lily.

3. *The Animal* - Dolphin

Seal

The Board may adopt, use and at will alter a corporate seal.

Schedule of Dues and Fees

The purpose of this document is to detail the schedule of dues and fees for the chapters, colonies, and alumnae of Alpha Omega Epsilon. A table listing the dues/fees and payment dates follows the description of all of the dues/fees. The Chapter Payment Form and Installation Payment Form are available for additional assistance.

Cash Payment Disclaimer:

Alpha Omega Epsilon Sorority will do its best to ensure correct fiscal practices are followed and all transactions are tracked regardless of payment method to the best of our ability. However, payments made by sending cash through the mail will be at the risk of the payee. Alpha Omega Epsilon sorority does not accept responsibility nor liability for any cash sent through the mail.

Colony Installation Fee:

Upon becoming a colony of Alpha Omega Epsilon, the new colony owes an installation fee of \$125 US for each candidate. If the fee cannot be paid at the colony installation, a payment structure can be arranged with the Board Treasurer. The payment structure must be agreed upon one week before the date of the colony installation. The Board will review the colony installation fee as needed.

Colony Dues and Liability Insurance Fees:

Alpha Omega Epsilon Colonies owe dues of \$50 US to the Board Treasurer for each member of the colony each term (January 1 – June 30 and July 1 – December 31). The colony will not owe dues for terms where the colony was installed to colony status or the term where the colony is installed as a chapter. Dues for the January 1 – June 30 term must be postmarked by May 15th. Dues for the July 1 – December 31 term must be postmarked by December 15th.

Dues are subject to a Gross Domestic Product (GDP) adjustment. Canadian Chapters should use a GDP conversion equivalent to that listed in the first week of January of the current calendar year, as provided by the Board Treasurer for Chapter dues. The Board will review the dues as needed.

Chapter Installation Fee:

Upon becoming a chapter of Alpha Omega Epsilon, the new chapter owes an installation fee of \$150 US for each new active member. If the fee cannot be paid at the chapter installation, a payment structure can be arranged with the Board Treasurer. The payment structure must be agreed upon one week before the date of the chapter installation. The Board will review the chapter installation fee as needed.

Candidate Initiation Fee:

Upon a candidate initiation into a colony or chapter, each candidate owes a fee of \$40 US to the Sorority. This fee is non-refundable regardless of completion of the membership education period. Fees for the January 1 – June 30 term must be postmarked by May 15th. Fees for the July 1 – December 31 term must be postmarked by December 15th. Candidate initiation fees are subject to a GDP adjustment. Canadian Chapters should use GDP conversion equivalent to

that listed in the first week of January of the current calendar year, as provided by the Board Treasurer for candidate initiation fees. The Board will review the candidate initiation fee as needed.

Chapter Dues and Liability Insurance Fees:

Alpha Omega Epsilon Chapters owe dues of \$50 US to the Board Treasurer for each active-active, active-co-op, and active-passive in the chapter each term (January 1 – June 30 and July 1 – December 31). Dues for the January 1 – June 30 term must be postmarked by May 15th. Counts for each membership status to be determined in the February 15th OTR for the January 1st to June 30th term. Dues for the July 1 – December 31 term must be postmarked by December 15th. Counts for each membership status to be determined in the October 15th OTR for the July 1st to December 31st term.

Dues are subject to a Gross Domestic Product (GDP) adjustment. Canadian Chapters should use a GDP conversion equivalent to that listed in the first week of January of the current calendar year, as provided by the Board Treasurer for Chapter dues. The Board will review the dues as needed.

Fines:

Fines may be imposed by the Board of Directors as specified in the governing documents and the amount of any fine will be at the discretion of the Board. Fines imposed on chapters by the Board as penalties for delinquency of chapter duties and obligations must be postmarked by the date directed by the Board in a misconduct letter. The Board will review fines as needed.

Late Fees:

Late fees will be applied to any dues or fees payment that is not postmarked by the proper date. A late fee of \$25 US will be applied to any dues/fees payment postmarked up to one month late. A late fee of \$50 US will be applied to any dues/fees payment postmarked up to three months late. A late fee of \$100 US will be applied to any dues/fees payment postmarked up to six months late. Any dues/fees not received within six months of the payment deadline may result in chapter/colony probation. Late fees are subject to a GDP adjustment. Canadian Chapters should use a GDP conversion equivalent to that listed in the first week of January of the current calendar year, as provided by the Board Treasurer for late fees. The late fee structure will be reviewed by the Board as needed.

Alumna Promissory Note:

Upon gaining alumna status, each alumna owes \$300 US payment on their promissory note. Payment plan options are available through the Promissory Note Committee.

Payment is due in full within 3 years of being granted alumna status. If the member was a Charter Member, meaning she paid the \$150 US Chapter Installation Fee (as described above), then her promissory note is lowered to \$200 US, due in full within 3 years of being granted alumna status. The Board will review the alumna promissory note as needed. If the Charter Member is an alumna by the Chapter's Installation, the promissory note payment would be due within 3 years of their Chapter's installation date.

Additionally Insured Request Fee:

Requests to list an entity as additionally insured on the Sorority's insurance policy shall be accompanied by a fee of \$250 US. This fee will be paid by the active chapter directly to the Sorority's insurance broker. This fee is up to the discretion of the Sorority's insurance broker, and is subject to change without advance notice.

Table 1: Dues and Fees Structure for Alpha Omega Epsilon Sorority

Fee	Amount Due	Date Due
<i>Colony Dues and Liability Insurance Fee</i>	\$50 US per each candidate*	May 15th each year December 15th each year
<i>Chapter Dues and Liability Insurance Fee</i>	\$50 US per each sister*	May 15th each year December 15th each year
<i>Colony Installation Fee</i>	\$125 US for each candidate*	Date of colony installation unless payment structure arranged with Board Treasurer
<i>Chapter Installation Fee</i>	\$150 US for each new member*	Date of chapter installation unless payment structure arranged with Board Treasurer
<i>Fines</i>	Determined on a case by case basis by the Board	Date set by the Board in a misconduct letter
<i>Late Fees</i>	\$25 US for dues/fees up to 1 month late*; \$50 US for dues/fees up to 3 months late*; \$100 US for dues/fees up to 6 months late*	
<i>Candidate Initiation Fee</i>	\$40 US for each candidate*	May 15th each year December 15th each year
<i>Alumna Promissory Note</i>	\$300 US for each alumna**	Due within 3 years of alumna status transition
<i>Additionally Insured Request Fee</i>	\$250 per request***	Due at time of request

*GDP Conversion is defined as the CAN\$ to US\$ exchange rate on January 1st of the calendar year. (Reference the *Foreign Exchange Rate Policy*)

**\$200 US for each alumna who was a Charter Member of their chapter.

***This fee is up to the discretion of the Sorority's insurance broker, and is subject to change without notice.

[Chapter-Colony Payment Form](#)

[Chapter-Colony Payment Form - Canada](#)

Small Chapters Exception Policy

Purpose

The purpose of this policy is to establish and document the exceptions to the rules and regulations that are directly affected by chapter size. These rule exceptions help stable, small sized chapters be able to succeed without constant and potentially disruptive intervention of the Board.

Small Chapter Determination

A chapter shall be eligible for the Small Chapter Exception if they meet the following criteria:

- Chapter is at least 5 years old
- Chapter has maintained a steady active membership of between 5 and 15 members
- Chapter is not under probation for any reason except size
- Chapter holds recruitment twice a year
- Chapter must explain external factors which make the chapter small in size via a petition to the Board

List of Exceptions Recognized by the Board

Should a chapter be deemed eligible for the Small Chapters Exception, the following rules shall apply:

- Probation by Size: A chapter shall be placed on probation if the active membership falls below 5 and therefore cannot have a full executive board (Chapter President, Chapter Vice President, Chapter Treasurer, Chapter Secretary and Chapter Membership Educator). The adjustment allows for small chapters to function without being under constant probation.
- On Target Report Events: A chapter shall have half their active membership present for an event to count. This adjustment helps eliminate unfair advantages that small chapters may have.
- Voting: A minimum of two no votes are required in all cases where a 90% vote is called for. This adjustment helps eliminate single swing votes.

Board Notes and Approval

Board will have the right to approve or disapprove chapters' petitions to become recognized as a Small Chapter on a case by case basis. The Board reserves the right to adjust these exceptions as needed, and when adjustments are made the Director of Chapter Services shall notify affected chapters.

Social Utility Policy

A social utility is defined as a public online network for posting information, photos, videos and other forms of media. This includes, but is not limited to, online profiles, individual websites, or blog.

The purpose of this policy is to properly define the necessary behavior required when associating yourself with Alpha Omega Epsilon on such social utility networks including, but not limited to Facebook, Myspace, YouTube and college or alumni networks.

Media, as referenced in this document, refers to, but is not limited to: photos, video, or audio. This policy is meant to complement all current policies as well as the Bylaws. Please reference these documents for further information on Risk Management Issues or Sorority procedure.

Active members, candidates and alumnae of Alpha Omega Epsilon are welcome and encouraged to associate themselves with Alpha Omega Epsilon through the social utility networks through any of the following channels:

- Listing Alpha Omega Epsilon as an activity or interest
- Wearing your Alpha Omega Epsilon letters in pictures published
- Wearing your Alpha Omega Epsilon letters in videos published
- Joining an Alpha Omega Epsilon group

However, in associating yourself with Alpha Omega Epsilon you are also accepting the responsibility of properly representing and retaining the positive image of the sorority at all times and upholding the *Risk Management Policy* of Alpha Omega Epsilon. Doing so includes taking steps such as:

- Properly documenting Alpha Omega Epsilon. This refers to listing Alpha Omega Epsilon as AΩE, A.O.E., AΩmegaE, or Alpha Omega Epsilon. Referring to Alpha Omega Epsilon as AOE (no periods) is incorrect and is referring to another sorority, Alpha Omicron Epsilon.
- Properly reflecting the Sorority with any captions used. For example, *recruitment* should not be referred to as *rush*. *Candidate* should not be referred to as *pledge*.
- If you have listed Alpha Omega Epsilon in your profile, all media that is tagged or published by you should be appropriate and professional. Media of underage drinking, illegal acts or other inappropriate media (as deemed by the Board) should not be published by yourself and you should not be tagged in any such media. Please reference the *Risk Management Policy* for an extensive list of inappropriate acts/items.

Transgender Policy

The Alpha Omega Epsilon defines “female” as any individual who self-identifies as female, regardless of her assigned sex at birth or her expression or the perceived expression of her gender.

Members will remain members, even if they decide to transition after initiation and/or graduation. In other words, a member who is a transgender-male retains all membership rights commensurate with their membership status.

Statement on Title IX: Federal and state law provides no clear and consistent definition of gender. Therefore, Alpha Omega Epsilon adopts the most expansive policy under present law in order to prevent exclusion and/or discharge of Transgender members regardless of legal gender designation. This policy is not intended to change the all-female character of the Sorority, nor waive the rights of Alpha Omega Epsilon under Title IX. This policy is intended to be fully consistent with the National Panhellenic Conference’s Position Statement on Right of Association as Women’s Only Organizations.

Transportation Policy

Formal transportation programs (i.e. Safe Rides) and carpooling can bring an added risk and liability along with negative exposure to our Sorority. The purpose of this policy is to recommend procedures for using transportation to and from Sorority and non-Sorority related events.

Recently, transportation practices for Greek organizations have been called into question. Based upon the guidance of our insurance broker, Alpha Omega Epsilon researched the behavior of our Chapters. We found that Chapters were using programs such as Safe Rides or Designated Driver to transport Active Chapter members and their guests from events held by Chapters of Alpha Omega Epsilon and un-related sorority activities (i.e. social gatherings, study sessions, etc.) to prevent members from walking home alone to avoid transportation cost or at times when no mass transportation (i.e. public transportation) options were available. Although these programs promote safety and have the best intent, the programs bring an unnecessary risk to the future of our Sorority. Safe ride programs, carpooling or any instance where the responsibility for the welfare of a member(s) is placed upon another member to safely transport a member to and from an event becomes a challenge for insurance companies to defend in court. Members cannot sign a waiver to waive the rights of their heirs in the event of a fatal accident. Any transportation claims involving safe ride programs or carpooling members of an organization can and will be significant. Chapters and the Sorority will most certainly be included in the suit.

Alpha Omega Epsilon strongly encourages the use of any form of mass transportation that does not place responsibility on another member, to and from Sorority related events. In other words, seek to place the liability onto another (insured) party. Examples are contracted limo or Bus Company, etc.

The following are suggestions and considerations that Chapters shall take into account when planning events.

- Plan events accordingly with mass transportation timelines
- Hold events on campus or close to campus to reduce the amount of people driving
- At events where alcohol is served, cut off serving alcohol several hours before an event is over
- Request alumnae to donate money to the Chapter for the event to be held^{ii,iii}

ⁱ (James R. Favor & Company, LLC, Risk Management Bulletin: Automobile and Transportation Exposures, April 2012)

ⁱⁱ Directors are prohibited from donating money to Chapters to assist with transportation cost.

ⁱⁱⁱ Volunteers of Alpha Omega Epsilon can make donations to Chapters but it will be harder to defend as you have to separate the volunteer from the donation.

Voting Procedure

Quorum

Quorum is required to conduct all business including chapter meetings and all votes and shall be defined as a majority of all active-actives and active co-ops.

Chapter Voting Procedures

All actives with the exception of active-passives have the right to vote on any chapter vote. Any active will lose this right if they miss two consecutive active meetings. An active may regain the right to vote by attending two consecutive meetings prior to the meeting of the vote.

The Chapter Recording Secretary and the Chapter President will count all votes. The Chapter Recording Secretary shall record all votes and their results.

Voting requirements, privileges and responsibilities are categorized into three categories: Bylaw Vote, Meeting Vote and Membership Election Vote, as defined below.

Chapter Bylaw Vote

Amendments to the Chapter Bylaws can be proposed by any member of the Chapter and will be enacted through the following procedures:

1. Oral presentation to the chapter;
2. Written presentation to the chapter;
3. Discussion of the amendment at the chapter meeting;
4. Voting at the next chapter meeting;
5. Written presentation and approval by the Governance Committee.

Amendments must be approved by 3/4's majority vote by secret written ballot. The votes will be counted by the Chapter President and an appointed chapter representative.

Meeting Vote

A motion for a meeting vote may be brought up by any member and seconded according to Robert's Rules of Order, Newly Revised, during any Sorority meeting. After the motion for the vote is brought to the floor, there will be a time of discussion monitored by the Chapter President. When the Chapter President feels the topic has been sufficiently discussed, she will call for a vote on the motion by vocal ballot (aye or nay). Majority vote passes the vote.

Membership Election Vote

A membership election vote is for election to candidate status and for election to active status. A membership election vote is a 90% majority vote by secret ballot by the Chapter quorum. If 10 percent or more of the votes are "no" votes, unless a chapter's active membership is at or

below 10 members, the vote does not pass. When a chapter's active membership is at or below 10 members, if two or more of the secret ballots are "no" votes, the vote does not pass.

If a Membership Election vote for active status does not pass, proceedings to withdraw an invitation to membership are initiated per the *Membership Withdrawal Procedure*.

The Board of Directors, Staff & Volunteers

Accounting Review Policy

Purpose

The purpose of this policy is to detail the accounting policy of Alpha Omega Epsilon as well as the procedures to be used when reviewing the sorority's financial records,

Policy

Every year in the first four months of the year, the National financial records will be reviewed by the Financial Committee and an independent third party hired by the Board. This will allow for all (if any) discrepancies that arise to be dealt with before any change of officers occurs. The accounting review volunteer cannot be any person who has check-signing authority for the sorority.

The procedures to follow when completing an accounting review are as follows:

1. The Board Treasurer will turn over all financial records to the reviewer including but not limited to financial computer files, bank account registers, bank statements, cancelled checks, deposit slips, bills paid, cash/check receipts, tax returns, and investment documentation.
2. The reviewer will check all records for accuracy and prepare a report detailing his/her findings. A copy of the report will be given to all Directors and recorded in the Board meeting minutes.
3. Any discrepancies noted in the reviewers report will be resolved by the Board before officer elections. Discrepancies and their resolutions will be documented by the Board and stored with the accounting review report.
4. The reviewer's report and the Board resolutions will be kept on file by the of Board Treasurer.

Advance Check Policy

The purpose of this policy is to detail the procedure to be used for cash (check) advances for the Directors, volunteers and committee members.

Cash (check) advances can be requested from the Board Treasurer only by members of the Board. The Board Treasurer must pass all requests for cash (check) advances for herself and her own committees through the Board President. Committees and volunteers must pass their requests for cash (check) advances through their reporting Director.

Cash (check) advances under \$100 US need only be approved by the reporting Director and the Board Treasurer.

Cash (check) advances over \$100 US must be approved by majority vote of the Board. The approval must be documented in the Board meeting minutes.

Expense reimbursement procedures still apply. If an expense report has not been submitted, in accordance with the *Expense Reimbursement Policy*, the funds will be reimbursed to the sorority by whom the check was made payable within thirty days.

Anything purchased for the Sorority, but not utilized, will be returned or reimbursed to the Sorority within thirty (30) days.

Amendment to Bylaws Procedure

Requirements for amendment to the Sorority Bylaws are provided in Article XI of the Bylaws.

Bylaw amendment proposals may be submitted to the Board by a member of an Active Chapter, alumnae, committee member, or Director. Proposals that are to be voted by the convention delegation or by Board of Director vote must be specified in the proposal. If the voting means are not specified, the amendment will be voted on by the Board of Directors.

Vote By Convention Delegation

Amendments to the Bylaws will be enacted through the following procedure by the Convention Delegation:

1. Written presentation to the Board.
2. The presentation shall include the author's name, address, phone number, chapter affiliation, active status, background information, the proposal, and the year that the convention Bylaw vote is to occur.
3. Proposals submitted by February 1 of the year of convention will be accepted for voting at the next convention.
4. Proposals submitted after February 1 may be accepted at the discretion of the Board, may be held for the convention following the next convention, or may be resubmitted for a vote by the Board.
5. All proposals for convention shall be sent electronically to chapters on April 1 prior to convention.
6. The proposal shall be presented orally to the convention quorum, at least one day prior to the vote.
7. Discussion of the amendment shall occur immediately following the oral presentation of the proposal.
8. Voting day shall be the day following the presentation to the quorum.
9. Amendments must be approved by a 3/4's majority vote by secret written ballot. The votes will be counted and certified by the Board President and Governance Chair, or delegated representative.
10. The updated governing documents with the changes must be made available to all members no later than 2 weeks after the motion to amend passes.

Vote By Board of Directors

Amendments to the Bylaws made by the Directors will be enacted through the following procedure:

1. Written presentation to the Board. The presentation shall include the author's name, address, phone number, chapter affiliation, active status, background information, and the proposal.
2. The Board shall communicate any proposed amendments to the members, who will have a 30 day period to provide comments on the changes.
3. The proposal shall be presented orally to the Directors quorum.
4. Discussion of the amendment shall occur immediately following the oral presentation of the proposal.
5. Voting shall immediately follow the presentation to the quorum. Amendments must be approved by a 3/4's majority vote. The votes will be counted and certified by the President, or delegated representative.
6. The vote and amendments shall be published in the Directors meeting minutes and on the Alpha Omega Epsilon website.
7. The updated governing documents with the changes must be made available to all members no later than 2 weeks after the motion to amend passes.

Amendment to Policies & Procedures

Amendment proposals for the policies and procedures, and volunteer handbook may be submitted to the Board by a member of a sister. All proposals will be communicated to the membership for review before being voted on by the Board of Directors.

Vote By Board of Directors

Amendments to the Policies and Procedures will be enacted through the following procedure:

1. Written presentation to the Board. The presentation shall include the author's name, address, phone number, chapter affiliation, active status, background information, and the proposal.
2. The Board shall communicate any proposed amendments to the members, who will have a 30 day period to provide comments on the changes.
3. The proposal shall be presented orally to the Directors quorum.
4. Discussion of the amendment shall occur immediately following the oral presentation of the proposal.
5. Voting shall immediately follow the presentation to the quorum. Amendments must be approved by a 3/4's majority vote. The votes will be counted and certified by the President, or delegated representative.
6. The vote and amendments shall be published in the Directors meeting minutes and on the Alpha Omega Epsilon website.
7. The updated Policies and Procedures with the changes must be made available to all members no later than 2 weeks after the motion to amend passes.

Check and Electronic Transaction Policy

The purpose of this policy is to detail the requirements to be followed for payment of services and reimbursements of qualified expenses either by check or electronic methods for Alpha Omega Epsilon, Inc.

The Board Treasurer and Board President may not write checks, sign checks, nor complete electronic transactions to themselves.

Transactions under \$1,000 US will be signed or processed exclusively by the Board Treasurer. If the Board Treasurer is unavailable, the Board President may sign checks or complete electronic transactions in her absence.

Transactions over \$1,000 US must be approved by both the Board Treasurer and the Board President; either by signature if using a physical check, or by written approval if using electronic methods. If using electronic means for transactions, written approval by the appropriate second board member must be received prior to completion of the transaction. Should the Board President or Board Treasurer be unavailable, the Board Vice President or Board Secretary may cosign transactions per the Board Treasurer and Board President's written request.

If the Board Treasurer submits an expense report that exceeds \$1,000 US, the Board President shall address the transaction to the Board Treasurer and the Board Vice President or Board Secretary shall cosign (either physically if by check or by written approval for electronic means).

If the Board President submits an expense report that exceeds \$1,000 US, the Treasurer shall address the transaction to the Board President and the Board Vice President or Board Secretary shall cosign (either physically if by check or by written approval for electronic means).

Expenses over \$3,000 must have majority approval by the Board. Expenses over \$3,000 that do not require additional majority approval are those specifically identified in the review and approval of the annual budget including but not limited to insurance, The Angle, convention and specifically listed consulting activities.

If any of the invoices or receipts would cause the total of any line item in the Annual Budget to exceed the originally approved allocation, the committee head or Board member responsible for management of the line item, may approve overages up to \$500 over the original allocation. Any amount leading to more than a \$500 overage must be approved by majority vote of the Board or the line item shall be reevaluated and voted upon by the Board.

Conflict of Interest Policy

This conflict of interest policy is designed to help Directors, volunteers, and employees of ALPHA OMEGA EPSILON SORORITY identify situations that present potential conflicts of interest and to provide Alpha Omega Epsilon Sorority with a procedure which, if observed, will allow a transaction to be treated as valid and binding even though an officer, volunteer, or employee has or may have a conflict of interest with respect to the transaction.

1. Definitions.

- a. A “*Conflict of Interest*” is any circumstance described in Part 2 of this Policy.
- b. A “*Responsible Person*” is any person serving as a Director, volunteer, or employee of Alpha Omega Epsilon Sorority.
- c. A “*Family Member*” is a spouse, domestic partner, parent, child or spouse of a child, brother, sister, or spouse of a brother or sister, of a Responsible Person.
- d. A “*Material Financial Interest*” in an entity is a financial interest of any kind, which, in view of all the circumstances, is substantial enough that it would, or reasonably could, affect a Responsible Person’s or Family Member’s judgment with respect to transactions to which the entity is a party. This includes all forms of compensation.
- e. A “*Contract or Transaction*” is any agreement or relationship involving the sale or purchase of goods, services, or rights of any kind, the providing or receipt of a loan or grant, or the establishment of any other type of pecuniary relationship by Alpha Omega Epsilon Sorority. The making of a gift to Alpha Omega Epsilon Sorority is not a Contract or Transaction.

2. Conflict of Interest Defined. For purposes of this policy, the following circumstances shall be deemed to create Conflicts of Interest:

a. Outside Interests.

- i. A Contract or Transaction between Alpha Omega Epsilon Sorority and a Responsible Person or Family Member.
- ii. A Contract or Transaction between Alpha Omega Epsilon Sorority and an entity in which a Responsible Person or Family Member has a Material Financial Interest or of which such person is a director, officer, agent, partner, associate, trustee, personal representative, receiver, guardian, custodian, conservator or other legal representative.

b. Outside Activities

- i. A Responsible Person competing with Alpha Omega Epsilon Sorority in the rendering of services or in any other Contract or Transaction with a third party.

- ii. A Responsible Person's having a Material Financial Interest in; or serving as a director, officer, employee, agent, partner, associate, trustee, personal representative, receiver, guardian, custodian, conservator or other legal representative of, or consultant to; an entity or individual that competes with Alpha Omega Epsilon Sorority in the provision of services or in any other Contract or Transaction with a third party.
- c. Gifts, Gratuities and Entertainment. A Responsible Person accepting gifts, entertainment or other favors from any individual or entity that:
 - i. does or is seeking to do business with, or is a competitor of Alpha Omega Epsilon Sorority; or
 - ii. has received, is receiving or is seeking to receive a loan or grant, or to secure other financial commitments from Alpha Omega Epsilon Sorority; under circumstances where it might be inferred that such action was intended to influence or possibly would influence the Responsible Person in the performance of his or her duties. This does not preclude the acceptance of items of nominal or insignificant value or entertainment of nominal or insignificant value which are not related to any particular transaction or activity of Alpha Omega Epsilon Sorority.

3. Procedures.

- a. Prior to board or committee action on a Contract or Transaction involving a Conflict of Interest, an officer or committee member having a Conflict of Interest and who is in attendance at the meeting shall disclose all facts material to the Conflict of Interest. Such disclosure shall be reflected in the minutes of the meeting.
- b. A Director or committee member who plans not to attend a meeting at which he or she has reason to believe that the Board or committee will act on a matter in which the person has a Conflict of Interest shall disclose to the chair of the meeting all facts material to the Conflict of Interest. The chair shall report the disclosure at the meeting and the disclosure shall be reflected in the minutes of the meeting.
- c. A person who has a Conflict of Interest shall not participate in or be permitted to hear the Board's or committee's discussion of the matter except to disclose material facts and to respond to questions. Such person shall not attempt to exert his or her personal influence with respect to the matter, either at or outside the meeting.
- d. A person who has a Conflict of Interest with respect to a Contract or Transaction that will be voted on at a meeting shall not be counted in determining the presence of a quorum for purposes of the vote. The person having a conflict of interest may not vote on the Contract or Transaction and shall not be present in the meeting room when the vote is taken, unless the vote is by secret ballot. Such person's ineligibility to vote shall be reflected in the minutes of the meeting. For purposes of this paragraph, a Director of Alpha Omega Epsilon Sorority has

a Conflict of Interest when he or she stands for election or reelection as a Director.

- e. Responsible Persons who are not Directors of Alpha Omega Epsilon Sorority, or who have a Conflict of Interest with respect to a Contract or Transaction that is not the subject of Board or committee action, shall disclose to the Chair or the Chair's designee any Conflict of Interest that such Responsible Person has with respect to a Contract or Transaction. Such disclosure shall be made as soon as the Conflict of Interest is known to the Responsible Person. The Responsible Person shall refrain from any action that may affect Alpha Omega Epsilon Sorority's participation in such Contract or Transaction. In the event it is not entirely clear that a Conflict of Interest exists, the individual with the potential conflict shall disclose the circumstances to the Chair or the Chair's designee, who shall determine whether there exists a Conflict of Interest that is subject to this policy.
4. Confidentiality. Each Responsible Person shall exercise care not to disclose confidential information acquired in connection with such status or information the disclosure of which might be adverse to the interests of Alpha Omega Epsilon Sorority. Furthermore, a Responsible Person shall not disclose or use information relating to the business of Alpha Omega Epsilon Sorority for the personal profit or advantage of the Responsible Person or a Family Member.
 5. Review of policy.
 - a. Each new Responsible Person shall be required to review a copy of this policy and to acknowledge in writing that he or she has done so.
 - b. Each Responsible Person shall annually complete a disclosure form identifying any relationships, positions or circumstances in which the Responsible Person is involved that he or she believes could contribute to a Conflict of Interest arising. Such relationships, positions or circumstances might include service as a director of or consultant to a nonprofit organization, or ownership of a business that might provide goods or services to Alpha Omega Epsilon Sorority. Any such information regarding business interests of a Responsible Person or a Family Member shall be treated as confidential and shall generally be made available only to the President and any committee appointed to address Conflicts of Interest, except to the extent additional disclosure is necessary in connection with the implementation of this Policy.
 - c. This policy shall be reviewed annually by the Board. Any changes to the policy shall be communicated immediately to all Responsible Persons.

Conflict of Interest Statement

Director Removal Policy

The removal procedure shall be initiated by any Active Chapter or Director. The vote shall be a two-thirds majority of the Directors. The vote shall be verified by two Directors and the result forwarded to the Board. The Sorority shall recognize the result of the vote and shall declare the Director removed. The results shall be published in the next Board meeting minutes.

All officer materials shall be turned over to the remaining Board within two weeks in the most cost-effective manner possible. Failure to do so may result in (at the discretion of the Board) a change of Alumna status to Alumna-Passive or Alumna-Restricted, a refusal to reimburse any outstanding expenses until all materials are turned over, and/or a fine.

Documentation Policy

In order to maintain consistency amongst the Board and Chapters of Alpha Omega Epsilon, the Directors will upkeep their documents by reviewing their relevance to the organization and to the Chapters and revising them as needed. This policy will help the Board keep a current list of documents that must be maintained by the Chapters.

Each Director will update the documentation tracking spreadsheet when a document has been newly created, revised, or no longer needed.

Each Director is responsible for providing the Board with access to each document contained within the documentation tracking spreadsheet and providing notification to the Board that there is a change to the documentation or documentation tracking spreadsheet. Furthermore, the Board will notify, at a minimum, the Chapters, volunteers, and Chapter Audit Committee when there has been an update to the documentation tracking spreadsheet or to the documents contained therein. The Chapters, volunteers, and Directors will update their records as needed.

Documentation Procedure

This procedure has been written to assist the Board with the necessary steps to keep the officer binders as well as to assist the Chapters in maintaining their binders.

For the purposes of this policy, the term document refers to a policy or procedure that affects the overall operation of the Sorority, implies action or direction by the Board or coordinates amongst multiple committees of the Sorority.

Once a Director creates, revises or deems a document no longer relevant, that officer will upload the new or revised document, once approved by the Board, to the appropriate folder (under Documents in Drive) and update the document tracking spreadsheet with the appropriate information. The document tracking spreadsheet will be kept with all the documents that are in current use by the Board and Chapters in the Documents folder. For historical purposes, any document deemed no longer needed or where a revision has been made, the previous version or irrelevant document will be placed in a folder labeled Old in the Documents folder.

After the document has been uploaded, the officer will notify the Board, Chapters, volunteers, and/or users the location of where it can be found. The Chapters, volunteers, Board, and/or users should be asked to add documents to their binders or remove any old versions from their binders and replace them with the new version.

Elections of Board of Directors and Executive Committee Policy

The Executive Committee and Board of Directors (half every two years) shall be elected at conventions of Alpha Omega Epsilon held on even years by a majority vote according to the Bylaws.

Nominations

Two weeks after the close of Convention in an odd year, the Elections Committee shall open the "Request for Nominations" by requesting nominations of at least one qualified alumna nominee for each available seat on the Board of Directors and each Executive Committee officer.

The "Request for Nominations" shall include the deadlines for nominations, the information needed for an official nomination, the contact information of where to send the nomination, the Elections Committee contact information, a list of seats on the Board of Director and offices of the Executive Committee that are open for nomination, and the responsibilities of each of these positions.

The nomination and election of the Active Chapter Representative is described in the *Active Chapter Representative Policy*.

The foundation and past president are ex-officio members of the Board of Directors.

Any member may nominate an eligible alumna or self-nominate for a seat on the Board of Directors and Executive Committee officer position by petition, provided that the following requirements have been met:

1. The nominee is an alumna member and is qualified for the position per the Governing Documents.
2. The nominee has given consent, written or electronically, to be placed on the ballot.
3. A petition for the nominee and the nominee's consent shall be submitted to the Elections Committee by January 2nd. Included with the petition is a one-paragraph explanation why the nominee is an excellent choice for the given office.

No member may be nominated for more than one office on the Executive Committee.

If a nominee is not elected to the officer position and a nomination was not received for a Director-at-Large, the nominee will not be included on the Directors-at-Large ballot. But the nominee could still be considered as a write in.

The "Request for Nominations" is closed on January 2nd, and the Elections Committee shall publish the following by January 15th:

1. The nominee list;
2. The nominators' written petitions;

3. The written explanation of why the nominees are good for the office;
4. A voting ballot with due date;
5. A call for "Request for Volunteers" if applicable; and
6. A list noting the requirements and responsibilities for each office.

Should any seat(s) on the Board of Directors or Executive Committee officer position(s) have no nominees by January 2nd, the Elections Committee shall publish a "Request for Volunteers" for the seats on the Board of Directors and offices on the Executive Committee that have not received nominations. Eligibility qualifications shall also be included.

When a nominee is found, the Elections Committee shall immediately publish the revised nominee list within one week of receiving the nomination.

The "Request for Volunteers" is closed on April 1st, and the Elections Committee shall mail out election ballots to all members with voting rights postmarked by May 1st.

Voting

Each voting member may write on the ballot the name of any alumna who she chooses, and who is qualified, even though that alumna member was not nominated. Votes for ineligible nominees will be declared invalid. Illegible votes will be declared invalid. Votes declared invalid will be counted toward the votes cast, but will not be eligible votes.

Requirements for absentee voting is found in the *Convention Policy*.

Ballots will be collected and counted together by the current President and the Elections Committee Chairperson. In the event that neither the Elections Committee Chairperson nor the President is present at convention, the Board will select another alumna to serve in assisting the counting of ballots.

The Board President casts her vote but her vote is only used in case of a tie. The Board President will cast her vote on a ballot of a different color.

Elections of the Executive Committee Voting Process

The discussion of nominees for the Executive Committee shall be as follows:

1. The Elections Committee Chairperson or the Board President will read aloud the duties and responsibilities for each office to the assembly.
2. The following order of officers will be used during this election procedure: President, Vice President, Secretary, Treasurer, and Director of Chapter Services.
3. Each officer nominee will be allowed up to 3 minutes to address the convention assembly regarding their qualifications for the nominated office. Nominees for President will be allowed up to 5 minutes for their address. If there are multiple nominees for a specific position, the other nominee(s) will wait outside of the convention assembly

while each nominee is being questioned so that no one nominee has an unfair advantage.

4. Write-in nominees may petition the Convention Committee via a written or electronic petition by the close of business on the first day of Convention for the right to speak at convention. The Convention Committee will allow write-in nominees to speak, if time allows in the convention agenda, on a first-come first-served basis.
5. After all speeches have been given, chapter delegates and alumnae present at convention will be allowed a 5-minute question period per nominee. If there are multiple nominees for a specific position, the other nominee(s) will wait outside of the convention assembly while each nominee is being questioned so that no one nominee has an unfair advantage.
6. If time remains in the question period and all nominees have been questioned, the presiding officer can entertain a motion from the floor to open up a 1-minute question period for a specific nominee. Question periods will not extend beyond the time allotted according to the convention agenda.
7. After all nominees have been questioned by the assembly, an open 10-20 minute discussion period for each position will commence. All nominees for the given Executive Committee officer position will be asked to leave the convention assembly.
8. If time remains in the discussion period and all positions have been discussed, the presiding officer can entertain a motion from the floor to open up a 2-3 minute discussion period for a given position. Discussion periods will not extend beyond the time allotted during the convention agenda.

The process of voting on the Executive Committee shall be as follows:

1. All Executive Committee offices will be voted on concurrently with each voting member getting one vote per open seat. Ballots will include room for write in nominees.
2. A majority vote elects a nominee into the designated office, provided she meets the qualifications stated in the Article V Section 2 of the Bylaws and Volunteer handbook. Electing a nominee to the designated office automatically elects them to the Board of Directors.
3. In the event that no nominee achieves a majority vote, new ballots for that office will be distributed and a second vote will occur.
4. In the event that no nominee achieves a majority vote during the second vote, the office will be considered vacant and will be filled by appointment by the Board of Directors following convention.
5. The election results will be published in the next newsletter, the Board monthly minutes, and on the Alpha Omega Epsilon website.

Elections of the Directors-at-Large Voting Process

The discussion of nominees for the Board of Directors shall be as follows:

1. The Elections Committee Chairperson or the President will read aloud the duties and responsibilities for a Director-at-Large to the assembly.
2. Each Director-at-Large nominee will be allowed up to 3 minutes to address the convention assembly regarding their qualifications for the nominated position. All other nominee(s) running for a seat on the Board of Directors will wait outside of the convention assembly while each nominee is being questioned so that no one nominee has an unfair advantage.
3. Write-in nominees may petition the Convention Committee via a written or electronic petition by the close of business on the first day of Convention for the right to speak at convention. The Convention Committee will allow write-in nominees to speak, if time allows in the convention agenda, on a first-come first-served basis.
4. After all speeches have been given, chapter delegates and alumnae present at convention will be allowed a 5-minute question period per nominee. All other nominee(s) will wait outside of the convention assembly while each nominee is being questioned so that no one nominee has an unfair advantage.
5. If time remains in the question period and all nominees have been questioned, the presiding officer can entertain a motion from the floor to open up a 1-minute question period for a specific nominee. Question periods will not extend beyond the time allotted according to the convention agenda.
6. After all nominees have been questioned by the assembly, an open 10-20 minute discussion period will commence. All nominees for a seat on the Board of Directors will be asked to leave the convention assembly.
7. If time remains in the discussion period and all positions have been discussed, the presiding officer can entertain a motion from the floor to open up a 2-3 minute discussion period for a given position. Discussion periods will not extend beyond the time allotted during the convention agenda.

The process of voting on the Directors-at-Large shall be as follows:

1. All Directors-at-large will be voted on concurrently with each voting member getting one vote per open seat.
2. The nominees receiving the most votes will be elected to the Board. The number of nominees being elected to a Director-at-large position may change per the outcome of the Executive Committee elections.
3. In the event the last open Director position has two nominees with the same amount of votes, a runoff election will be held between the two eligible nominees. During a run-off election, votes may only be cast for the two eligible nominees. Any unfilled positions will be filled by appointment by the Board.

4. The election results will be published in the next newsletter, the Board monthly minutes, and on the Alpha Omega Epsilon website.

Installation of Directors & Officers

A nominee elected to an office is an "Officer-Elect". An "Officer-Elect" does not take office until she has taken the Oath of Office. The Directors and Executive Committee officers remain in office until her successor has taken the Oath of Office.

They shall be installed at the close of the convention at which they are elected, in accordance with the Ritual, or at the next opportunity. They shall hold office until the installation of their successors.

Past President

Within fifteen days of leaving office, the outgoing Board President is to submit to the Elections Committee her intent to accept the role of Past President position on the Board of Directors. If the Election Committee does not receive her acceptance, the Elections Committee will contact the preceding past president who will have fifteen days to accept the position. The Elections committee will contact up to the past three Board Presidents. If all decline, the Board can vote to either leave the position vacant or continue to contact preceding presidents.

If a Board President is removed from office she is not eligible for the position of Past President.

Director & Officer Transition

All Director materials shall be turned over to the newly elected Director or officer within one month of the date of replacement in the most cost-effective manner possible unless other arrangements are made with the approval of the newly elected Board. Failure to do so may result in (at the discretion of the Board) a change of Alumna status to Alumna-Passive or Alumna-Restricted, a refusal to reimburse any outstanding expenses until all materials are turned over, and/or a fine.

If the materials are not delivered in person or postmarked within the required timeframe, a fine will be set at the discretion of the Board and a letter notifying the outgoing Director of the fine will be sent via certified mail. If payment and materials are not delivered in person or postmarked within 30 days of receipt of the certified mail, additional fines may be assessed by the Board and include the value of the missing items. A second fine letter will be sent to the outgoing Director via certified mail.

Expense Reimbursement Policy

This policy defines the type of expenditures that will generally be recognized and reimbursed by the Sorority and the requirements for reimbursement of expenses. Alpha Omega Epsilon, Incorporated is a non-profit Sorority and unlike most for-profit businesses, may not be able to reimburse for all expenditures because of its limited funding from dues and fees, donations, and grants.

This policy applies to all Directors, committee members, volunteers, and staff of Alpha Omega Epsilon, Inc.

Travel and Accommodations

- Any travel and/or accommodations by a Director, a committee member, volunteer, or employee must be pre-approved by the overseeing Director.
 - i. If the travel and/or accommodations are not in the approved budget, the Board will need to vote to approve the additional expense.
- All travel and/or entertainment must be related to Alpha Omega Epsilon, Inc. business.
- All Directors, committee members, volunteers, and employees should practice fiduciary responsibility when making travel arrangements on behalf of Alpha Omega Epsilon, Inc.
- Airline travel should be arranged to ensure the best available rate by booking travel arrangements as far in advance as possible. Airline tickets in excess of \$525 US must be approved by the Board prior to purchase. Checked baggage fees will be reimbursed when a plausible reason is provided.
- Mileage reimbursement for official Alpha Omega Epsilon business shall be paid at the current charity mileage rate as defined by the U.S. Internal Revenue Service. This reimbursement rate covers depreciation of the vehicle, wear-and-tear on said vehicle, and gas incurred during the trip.
- Hotel expenses shall be reimbursed for room and tax only. Any phone calls, meals, or other incidental charges on the hotel bill shall be the personal responsibility of the individual(s) staying in the room. Where at all possible, multiple persons traveling together shall share lodging up to 4 persons per room.
- Directors, committee members, volunteers, and employees, individually or as a group, shall not be reimbursed for personal food expenses while traveling on Alpha Omega Epsilon business.
- In limited circumstances, food may be purchased by the Sorority or food expenses may be reimbursed. Such circumstances include, but are not limited to: information meetings for prospective colonies, other expansion activities, and meetings with

other fraternities and sororities. All reimbursements for food expenses must be approved by the Board President and the Board Treasurer.

- Rental car expenses shall be reimbursed for all days used in relation to sorority business. All volunteers and employees are to use their best judgement on gas expenses. Additional insurance charges shall be reimbursed on a case-by-case basis.
- Parking fees, tolls, taxi fares, and shuttle service fares shall be reimbursed by the Sorority. Reimbursement for taxi fares, shuttle services fares, and rental cars will not be made when car pooling was actually possible.
- Other travel expenses not outlined in this section will require approval of the overseeing Director or Board Treasurer for reimbursement.

Operational Expenses

- Budgeted expenses incurred in the day-to-day operations of Alpha Omega Epsilon, Inc. will be reimbursed. Operational expenses include, but are not limited to: office supplies, phone expenses, copying costs, printing fees, conference registration fees, and postage.
- Unbudgeted expenses must be pre-approved by the Board.
- All members of the Board, committee members, volunteers, and employees should practice fiduciary responsibility when making expenditures on behalf of Alpha Omega Epsilon Sorority.

Reimbursement Procedures

- An "Expense Report" form must accompany all requests for reimbursements detailing the nature of the expense, the amount of the expense, and the reason for each expenditure incurred.
- Receipts are required for all expenditures. If a receipt is not available, reimbursement will be at the discretion of the Board Treasurer. Detailed map routes may be used for mileage purposes.
- Expense Reports can be submitted electronically provided information is complete and receipts are included.
- Application for reimbursement for expenses incurred in service of the Sorority shall be presented to the Board Treasurer not later than 3 months following such expenditures. Any reimbursements submitted after the deadline, shall be paid at the discretion of the Board Treasurer.
- All expenses must be submitted by January 15 of the next fiscal year to be considered for reimbursement.
- The Board Treasurer reserves the right not to reimburse individuals for any and all expenses. In the case the Board Treasurer is unable to perform a reimbursement,

this right extends to the Board President when acting in the Board Treasurer's stead regarding matters of reimbursement.

- If an expense is denied for reimbursement, the applicant can contact the Board President for appeal.
- The expense reimbursement request shall be processed within 30 days of receipt.

[Expense Report Form](#)

Online Banking Policy

The purpose of this policy is to outline the procedures for using the Sorority's online banking access and information.

The following procedures shall be followed when using online banking:

- The Board Treasurer will have access to the online bank statements as she is the primary signer on the three Sorority bank accounts. The Board President, Board Vice President, and Board Secretary may also examine the online bank statements as they are secondary signers on the Sorority bank accounts.
- The Board Treasurer may make electronic transfers of funds between Business Checking account and the Set Aside Funds account in accordance with the Set Aside Fund Resolution signed by the Board President. Once these funds are transferred, the Treasurer shall inform the Directors of the transaction.
- The Board Treasurer shall permit a volunteer to examine all electronic bank records for the biannual financial audit.
- Only the Board Treasurer has authorization to order checks off the bank's website.

Travel Policy

Alpha Omega Epsilon members must complete the Travel Request Form at least two week prior to the travel date, with the exception of emergency conditions as authorized by the Executive Committee. A Director will review the Travel Request Form and will notify the traveler if the Travel Request Form is unapproved within a week of submission. Submission of the Travel Request Form does not guarantee that the traveler will be reimbursed for any part of their travel expense.

Advance planning to be cognizant of expenses and calendar scheduling should be taken in consideration.

If a member is traveling unapproved by a Director then the traveler is not covered under the Alpha Omega Epsilon Travel Insurance Policy.

[Travel Request Form](#)