

# **Volunteer Handbook**

# Table of Contents

<b>Welcome Letter</b>	<b>4</b>
<b>Sorority Structure</b>	<b>5</b>
<b>Volunteer Reporting</b>	<b>6</b>
<b>Time Commitment</b>	<b>7</b>
<b>How to Stop Volunteering</b>	<b>8</b>
<b>Committees</b>	<b>9</b>
<b>Standing Committees</b>	<b>9</b>
Executive Committee	9
Strategic Planning Committee	9
Governance Committee	9
Financial Committee	10
Active Chapter Advisory Council	10
<b>Ad-Hoc Committees</b>	<b>11</b>
Convention Committee	11
Elections Committee	11
AQE History Committee	11
Risk Management Committee	11
Promissory Note Committee	11
Member Relations Committee	12
Chapter Audits Committee	12
Volunteer Coordination Committee	12
Alumnae Relations Committee	12
Merchandise Committee	13
Newsletter Committee	13
Expansion Committee	13
<b>Advisors</b>	<b>14</b>
Chapter Advisor	14
Regional Advisor	14
New Chapter Advisor	15
<b>Board of Directors</b>	<b>16</b>

Eligibility Requirements	16
Policies and Procedures	16
An Officer's circle of influence	16
Commitment	16
Director Care and Duties	18
Financial	18
Planning/Development	19
Insurance	20
<b>Individual Director Duties</b>	<b>21</b>
President	21
Vice President	21
Treasurer	22
Secretary	23
Director of Chapter Services	24
Directors At-Large	25
Past President	25
Foundation Chairman	25
<b>Path of Advancement</b>	<b>26</b>

## Welcome Letter

Thank you for volunteering. We're glad you have decided to continue your involvement in Alpha Omega Epsilon beyond the college experience.

For more than 30 years, volunteers have been a valuable resource for our Sorority. By volunteering for Alpha Omega Epsilon, you'll not only help your sisters, but also contribute to the success of our Sorority.

This handbook will help you have the best possible experience as a volunteer. It answers frequently asked questions and gives information about the Sorority and your role as a volunteer. Your committee chair or member of the Board of Directors can answer most of your other questions, but please feel free to contact [volunteercoordination@alphaomegaepsilon.org](mailto:volunteercoordination@alphaomegaepsilon.org) any time you need assistance.

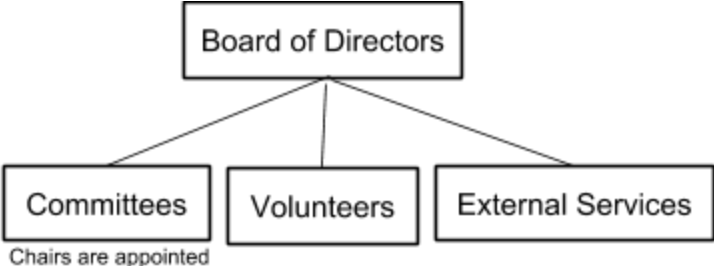
We look forward to working with you!

Sincerely,

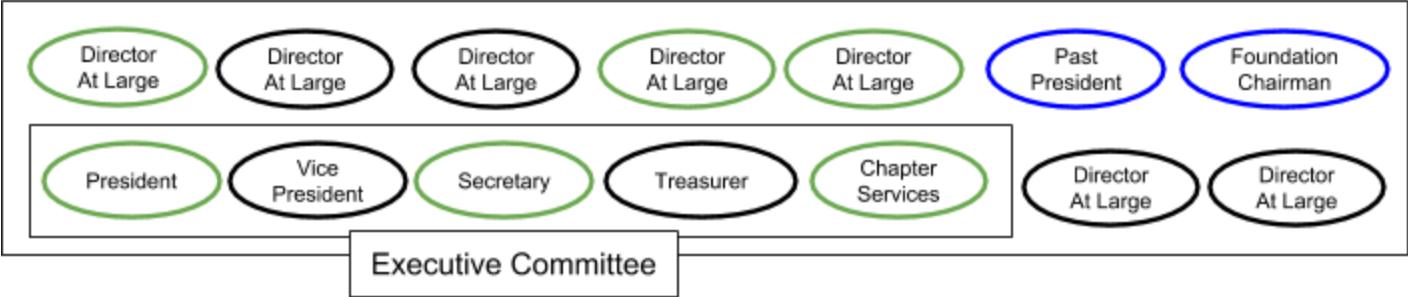
Your sisters on the Board of Directors

# Sorority Structure

The below structure is recommended but not limited to the following:



## Board of Directors



# Volunteer Reporting

## Expense Reports

Expense Reports should be submitted to the Director in charge of your committee. Directors have authorization to approve certain expenses and forward those expenses on to the Board Treasurer for payment.

Codes for expense reports can be found on the Expense Report form. You should use the codes that correspond to your committee assignment.

Submitted expense reports can take up to a month to process. If the requested amount is over the signing authority of the Board Treasurer, the processing time may be longer.

## Committee Reports

Each committee chair should submit a monthly progress report the Director overseeing that committee. The report should include a summary of the meetings held, action items, and any issues that arise. Committee members should help contribute information to be included in the report.

Committee reports are used to develop the Year In Review documents that are presented at Convention each year.

## Expectation Statement

Each committee member is asked to sign an expectation statement every year to commit to fulfilling the committee's tasks. The expectation statement outlines expected tasks to be completed and the anticipated time commitment for each task. If, after reading through the expectation statement, you feel that you cannot commit the time necessary or that you are qualified to complete the assigned tasks, you should contact [volunteercoordination@alphaomegaepsilon.org](mailto:volunteercoordination@alphaomegaepsilon.org) to find a committee assignment better suited to your available time and abilities.

## Time Commitment

It is expected that all Directors, volunteers, and staff are checking email at least once every business day.

It is expected that all Directors, volunteers, and staff respond back to email within 24 hours.

- It is professional and acceptable to respond back within 24 hours with an email saying that you: (i) have received and read their email; and (ii) will respond back to their specific request by a specific date.

It is expected that all Directors, volunteers and staff use Google calendar:

- Put their “office hours” online;
- Update the calendar with all vacation and unavailable times; and
- Share the calendar with all other Directors, volunteers, and staff.

It is expected that all Directors arrive for Convention on the Wednesday before and stay through Sunday after Convention.

It is expected that all Directors arrive for the working meeting on Friday night and stay through Sunday to give the Board at least 16 hours of work time.

It is expected that all Directors and volunteers submit their monthly report at least 1 week prior to the next Board or advisor conference call.

It is expected that all Directors contribute to the Board’s monthly agenda.

It is expected that all Directors review and comment on material for the next Board conference call in advance of the next conference call.

## How to Stop Volunteering

Life happens! If you need to step down from your volunteer position or you want to try out a different committee, that's okay!

If you are leaving your volunteer position, please fill out a [Volunteer Resignation Survey](#). The Board wants to know what we can do to improve the volunteer experience or how to help you moving forward.

If you want to change committees, work with your current committee chair to transition your duties to another committee member, fill out the Volunteer Resignation Survey stating why you want to leave that particular committee (again we want to improve based on your feedback), contact the committee you want to join, and continue volunteering!

The Volunteer Resignation Survey is used to track when you volunteered, why you left volunteering, and ways we can improve the volunteer experience. The Board is continually striving to make the volunteer experience as great as possible. If there is anything you think we can improve upon, we want to hear it! We are also trying to have better record keeping about our volunteers, so we can show how much work goes into running Alpha Omega Epsilon - and all as unpaid volunteers!

Thank you for volunteering for Alpha Omega Epsilon! We truly appreciate all of your time and effort to help continue making this Sorority AwesOmE!



## Committees

Each committee will report to the Board and will have a chairperson appointed by the Board.

Alumnae may not serve as a committee chairperson or co-chairperson if serving as an Alpha Omega Epsilon National Foundation Director.

At any time a committee chairperson or co-chairperson decides to join the Alpha Omega Epsilon National Foundation as a Director, the alumnae must submit her letter of resignation to the Director who oversees the committee from which she is resigning.

## Standing Committees

The following shall be standing committees, with the following responsibilities:

### Executive Committee

1. Handles routine matters that would otherwise take up the full Board's limited time.
2. Acts on behalf of the Board during the times between Board meetings.

### Strategic Planning Committee

1. Serves the strategic needs of the Sorority and does not engage in the day to day management.
2. May have various responsibilities and special projects that serve short and long term needs of the Sorority.

### Governance Committee

1. Maintains and updates the Sorority governing documents.
2. Reviews and/or develops amendments to Alpha Omega Epsilon governing documents.
3. Makes recommendations to the Board on amendments to the Sorority governing documents.
4. Clarifies and interprets the Sorority governing documents.
5. Guides and/or reviews amended chapter bylaws.
6. Reviews and makes recommendations to the Board on acceptance of colony Bylaws.
7. Reviews and makes recommendations to the Board on acceptance of chapter Bylaws.

## **Financial Committee**

1. Develops fundraising activities
2. Helps develop budgets for the Sorority.
3. Collects information and advises the Sorority on matters related to taxes and investments.
4. Advises chapters on budget procedures.

## **Active Chapter Advisory Council**

1. Relays information from the Board and a summary of the Board's meeting minutes to the regions.
2. Reviews and provides feedback on proposed policy changes.
3. Discusses business items on the agenda put forth by the Board.
4. Relays questions and concerns from the regions to the Board.
5. Submits an annual report to the Board President by the International Convention.

## Ad-Hoc Committees

The following shall be ad-hoc committees, with the following responsibilities:

### Convention Committee

1. Organizes the Sorority Convention.
2. Notifies all alumnae and active chapters of Convention details at least three months prior to the Convention.

### Elections Committee

1. Calls for Board nominations for elections.
2. Accepts and publishes Board nominations, and opens “Requests for Volunteers” for open offices.
3. Distributes valid nominations, qualifications, and absentee ballots to all members. In addition, distributes a request for “Nominees for Appointment” to all members.
4. Maintains and carries out voting procedures at Convention, unless delegated to another representative approved by the Board.
5. Publishes a list of the new officers.

### AQE History Committee

1. Compiles and maintains all permanent records of the Sorority.
2. Reviews and incorporates submitted family trees from chapters.
3. Insures photos are taken at Sorority events.

### Risk Management Committee

1. Develops programs and provides relevant information to colonies, chapters, committees, and Directors.
2. Assists the Board Secretary in reviewing and updating the *Risk Management Policy*.

### Promissory Note Committee

1. Maintain Promissory Note database.
2. Distribute Promissory Note payment information to all new alumnae.

3. Track and collect Promissory Note payments, sending them to the Board Treasurer on a monthly basis.

## Member Relations Committee

1. Organizes and oversees Sorority sponsored programs for chapters.
2. Fosters the development of leadership, professionalism, and philanthropy through Sorority sponsored programs.
3. Actively recruits alumnae to become more involved in programs.

## Chapter Audits Committee

1. Reviews and maintains the Chapter Audit Checklist.
2. Coordinates the performance of each chapter's audit.
3. Ensures that each chapter is audited in a timely manner, in accordance with the *Chapter Audit Policy*.
4. Maintains copies of all chapter audits performed.
5. Notifies the Director of Chapter Services of any concerns that arise during a chapter audit.

## Volunteer Coordination Committee

1. Maintains pertinent information on alumnae volunteers and their activities.
2. Solicit interest from alumnae in volunteering.
3. Obtains feedback from volunteers on volunteer activities and implement improvements as necessary.
4. Coordinates a service award plan.

## Alumnae Relations Committee

1. Organizes and oversees Sorority sponsored programs for alumnae.
2. Fosters the development of alumnae leadership, professionalism, and philanthropy through Sorority sponsored programs.
3. Notifies all chapters of programs.
4. Solicit and compile news and achievements from alumnae.

5. Provide newsletter articles to the newsletter committee.
6. Provide website content to webmaster relating to Alumnae webpage.
7. Contact alumnae social activity groups / clubs.
8. Compile the contact list for alumnae groups and publish that on the website for new graduate information.
9. Solicit interest and coordinate planning accordingly of alumnae vacation ideas.

## **Merchandise Committee**

1. Assists in developing merchandise for the Sorority.
2. Assist chapters with merchandise issues.

## **Newsletter Committee**

1. Collects information for inclusion in the newsletter.
2. Organizes, writes, and distributes the newsletter.
3. Maintains contact with Alumnae Relations Committee to keep the records updated.

## **Expansion Committee**

1. Develops and maintains procedures to lead interest groups through the Path to Alpha Omega Epsilon.
2. Develops interest at schools to form new chapters.
3. Representatives from the Expansion Committee will be assigned to guide and assist each colony through development.
4. Assists colonies in conforming to the Sorority governing documents.
5. Responsible for acquiring required paraphernalia for colony and chapter installations.
6. Responsible for preparing colony and chapter installation agendas.

# Advisors

## Chapter Advisor

A Chapter Advisor will be appointed by the Active Chapter in collaboration with the Regional Advisor and approved by each Regional Advisor. Each Chapter Alumnae Advisor will hold the office for at least one year.

The Regional Advisor may remove a Chapter Advisor as needed.

The duties of the Chapter Advisor shall be:

1. maintain close contact and communicate regularly with the chapter;
2. act as a liaison between the Board and the chapter;
3. verify that the chapter is complying with the Sorority governing documents;
4. report to the chapter's Regional Advisor;
5. advise the chapter;
6. initiate probation proceedings of the chapter; and
7. provide a monthly report to the Regional Advisor regarding the state of the chapter.

## Regional Advisor

A Regional Advisor will be appointed by the Director of Chapter Services. A Regional Advisor is responsible for the recruitment, management, and training of Chapter Advisors within a region. The Regional Advisors coordinate efforts between the Chapter Advisors within the region and/or regions.

The Director of Chapter Services may remove a Regional Advisor as needed.

The Regional Advisors have the following responsibilities and privileges:

1. provides guidance and support for the Chapter Advisors within her region;
2. recruits and trains Chapter Advisors for the chapters within her region;
3. provides a monthly report to the Director of Chapter Services regarding the chapters within her region;
4. supports the Board and upholds the ideals and objectives of the Sorority;
5. resolve chapter issues at a regional level before seeking the advice of the Director of Chapter Services and/or the Board; and

6. coordinates with the Director of Chapter Services to develop and/or plan chapter visits to foster the relationship between the Board and the chapters.

## New Chapter Advisor

A New Chapter Advisor will be appointed by the Director of Chapter Services. The New Chapter Advisor is responsible for advising all new chapters in the two years after their chapter installation date. The New Chapter Advisor works with the Chapter Advisors and Regional Advisors to ensure that new chapters are integrated into their regions.

The Director of Chapter Services may remove a New Chapter Advisor as needed.

The New Chapter Advisor has the following responsibilities and privileges:

1. provides guidance and support for new chapters and their Chapter Advisors;
2. provides monthly reports to the Director of Chapter Services and the Regional Advisors regarding new chapters;
3. supports the Board and upholds the ideals and objectives of the Sorority;
4. works to resolve new chapter issues with their Chapter Advisor prior to seeking the advice of the Regional Advisor and/or the Director of Chapter Services;
5. coordinates with the Director of Chapter Services and Regional Advisor to develop and/or plan chapter visits to foster the relationship between the Board and the chapters;  
and
6. attends new chapter Installations when she is available.

# Board of Directors

## Eligibility Requirements

To be eligible to serve as a Director one must be an alumna in good standing.

## Policies and Procedures

### Policies

Policies define the way in which the Sorority conducts business. Therefore, all policies (new and amended) need to be presented to the Board for a vote.

### Procedures

Procedures define the way in which a policy will be executed. All procedures (new and amended) shall be presented to the Board for a vote.

## An Officer's circle of influence

### Your office

You have the authority to develop and edit a manual for daily responsibilities of your office.

### Committees

You oversee your respective committees. In some situations, you may serve as chairperson and in other situations you are simply attending as the Board representative. In both cases, you are there to provide direction to the committee that will allow it to focus and prioritize in line with the goals and priorities of the Sorority.

In committees, you have the ability to make all sorts of improvements: procedures, policies, and new programs. All these efforts should be within the scope of your Director position goals and expectations as well as the Sorority goals.

## Commitment

### When commitment wanes

The Sorority has been volunteer managed for over 30 years and will continue to be volunteer-run for the foreseeable future. This means that we are all juggling multiple commitments: sometimes, even the best-laid plans don't succeed. When this happens, it is important to face this challenge head-on and make the right decision for you and for the Sorority.

If you feel that you need to re-prioritize your commitment to the Sorority, it is important to have



the conversation as early as possible. Not only is this the professional thing to do, it is necessary for the long-term care of the Sorority. When people come into and leave from the Board some forward momentum is lost. Being open and honest with your abilities will reduce the amount of momentum that is lost.

### Starting the conversation

You are having difficulty keeping pace with your commitments. Who do you talk to first? Chances are that you've already started expressing your concerns with another Director. Maybe that person can help you re-prioritize your Sorority commitment within your life. Use all resources you can as early as you can. But, please let the President know if you are struggling. The President can provide an additional level of prioritization for you. In addition, the President can help you determine whether you need to scale back your involvement or transition off the board.

### Scaling back involvement

It may be that there are temporary circumstances that will prevent you from being as involved with the daily grind as normal. For example, you are in school and you have finals over a two-week span. You want to put your Sorority projects on pause, focus on school, and then resume with full force afterwards. Discussing this with the President is a great way to make sure that the Sorority can float on while you are away.

### Resigning from the Board

There are those situations where temporarily scaling back won't work for you or for the Sorority. For example, you get a promotion at work that requires you to spend more time at work. This naturally means that you have less time for yourself and the Sorority. A promotion is a great opportunity for you and you should absolutely not be ashamed of stepping down from the Board. Being a professional means understanding what is important to you and where you are going to put your time and talent. Heartbreaking as it may be, refocusing our lives on what is important is essential to your happiness.

Talk with the President to determine if this is the course of action for you. The President has a process to find a replacement and to guide the Board of Directors through the transition period. Ideally, the transition period should several months to complete with the first month being the search for a suitable replacement. Of course, the President will work with you to develop a correct course of action.

### How do I know if I am doing a good job?

Here are some questions you can ask yourself to do a quick self-assessment of whether you are measuring up to the standards of the Board of Directors. You should be honest in your responses; these questions are for your consideration only.

- Are you consistently fulfilling the Board's expectation statement?
- Are you consistently fulfilling the requirements of your office?
- Have you consistently met your declared deadlines?

- If you haven't met your declared deadlines, are you communicating delays to the Board in a timely (advance) manner? Or do you wait until someone asks you where something is?
- Are you completing tasks assigned to you?
- Do you spend at least an hour a day (on average) working on Sorority work?
- Have other Directors frequently followed-up with you to find out where you are on certain projects?
- Given the choice between an hour in front of the TV/leisure activity and an hour doing Sorority work, what do you choose?
- Are chapters reaching out to other Directors because they do not hear back from you?
- Have members expressed dissatisfaction with your ability to communicate?

### Transition off the Board

After the conclusion of your service as a Director, you are required to transition to your successor. A successful transition is crucial for the next in line to understand the process and move the Sorority forward. You are required to transition within a month of the election of the new officer. Please make arrangements to transition with the newly elected officer prior to the deadline as typically multiple rounds are required to fully transition or at least one meeting for the transition followed by several rounds of questions from the new officer.

## Director Care and Duties

### Financial

#### Budget

It is your responsibility to review the budget on a monthly basis. It is your responsibility to ensure that line-items are being properly attributed for spending costs and that the Sorority is not unwisely or improperly using funds.

#### Appropriation of funds

Sometimes it is necessary to repurpose funds in the budget. Oftentimes this need arises for unforeseen costs. One example is when the emergency travel budget has been exhausted. If there are other line items that have money allocated to them, then the Board move to repurpose the money to be used towards the emergency travel budget.

When money needs to be re-allocated, a motion must be brought before the Board prior to the next monthly meeting. (This is just standard operating procedure.) The motion should include the following pieces of information

1. Description of the need

2. Rationale for why the money was not previously budgeted
  - a. Example: need was not foreseen at budget time
  - b. Example: unforeseen increased demand for additional resources
  - c. Example: unexpected spike in cost for materials
3. The budget number for the exhausted (or non-existent) line item
4. The budget number from which the money is proposed to come
5. Rationale for why the money should come from the proposed budget number
  - a. Example: Overestimated the cost for materials/activity
  - b. Example: Need no longer exists

### Quotes/Pricing out materials

As a rule of thumb, all quotes for materials or labor should come from at least three different businesses. This is general business practice. The quotes should be stored away according to the record retention policy. It is recommended that quotes should contain the following information:

1. name of provider;
2. description of material/services provided;
3. dates for service/materials;
4. shipping/transportation costs;
5. total cost to Sorority;
6. payment methods and payment schedule; and
7. deadline for locking in rate/timeframe.

Committees that generate their own budget may seek out quotes on their own. There is no requirement that committees submit their budget or quotes to the Board for approval. In fact, it is recommended that committees control their own budget. Please note that only the President or delegate appointed by the Board may sign contracts.

There are exceptions to this rule. For example, Ken Jernigan and Associates is the only approved vendor to manufacture material with the Crest on it. Therefore, there is no reason to seek out additional quotes. Another example is Herff Jones.

## **Planning/Development**

### Long-range planning

Every year the Board will evaluate the progress the Sorority has made the previous year.

Long-range goals will be created for the entire term of the Director after election that are in line with the overall Board goals and direction of the Sorority. These are typically one to two-year timelines.

### Short-term planning

Planning is an essential part of running this sorority. Each long-range goal will be broken out into smaller short-term goals (often due every month or every other month).

### Completing Tasks/Goals

Tasks will be created for all short-term and long-range goals. It is important to keep these goals moving by completing tasks in a timely fashion. If you are going to be late on a task, communication is critical. Everyone has tasks that get delayed, but the real failure is when those delays aren't communicated to others.

## **Insurance**

### Contracts

Anything that requires a contract will need an Event Planning Form filled out in order to analyze the event with our insurance broker. Remember, no one should sign on behalf of "Alpha Omega Epsilon" except the President or delegate appointed by the Board. Chapters should be signing contracts only with the name of the chapter (i.e. "Beta Alpha Chapter of Alpha Omega Epsilon").

### Event Planning Forms

Any events that involve alcohol or risk need to be evaluated with a completed Event Planning Form. There is a procedure for completing and reviewing Event Planning Forms that can be found in the Policies and Procedures.

# Individual Director Duties

## President

In addition to her duties provided in the Act of the Bylaws, the President shall:

1. know and uphold the governing documents;
2. presides at the Sorority Conventions and at meetings of the Board;
3. oversee planning of the Convention and any other international level programming;
4. review expulsion and voluntary resignation requests and presenting the motions to the Board for a vote;
5. serve as impartial moderator of all meeting;
6. preside over all International Ceremonies;
7. maintain all short and long-term goals of the Sorority;
8. sign charter and membership certificates;
9. provides general supervision over the activities of the Directors. She cares for matters of discipline and extremes;
10. votes on all legislation presented to the Board or to the Convention, but her vote is counted only in the event of a tie;
11. Attend chapter installation ceremonies;
12. maintains and submits necessary forms to maintain the legal status of the Sorority, such as Incorporation and Tax Exemption; and
13. submit a quarterly summary of the Board activities to active chapters and alumnae.

### Committee Assignments:

Convention and Member Relations

## Vice President

In addition to her duties provided in the Act of the Bylaws, the Vice President shall:

1. oversee the management of the Sorority's governing documents, including Chapter Bylaws;
2. oversee the elections process, including voting by the delegation at the Sorority Convention, and review all amendments to the Bylaws;
3. preside over the meetings in the absence of the President;

4. votes on all legislation presented to the Board or to the Convention;
5. knows and upholds Robert Rules of Order;
6. shadows the President and is aware of Presidential responsibilities in case of office vacancy; and
7. fosters relationships with other engineering and Greek organizations.

Committee Assignment:

Elections and Governance.

## Treasurer

In addition to her duties provided in the Act or the Bylaws, the Treasurer shall:

1. oversee the international budget;
2. record and account for all income and debt for legal and tax purposes;
3. review and approve reimbursement requests for Board expense over \$50.00;
4. maintain the Sorority's Financial Records;
5. pay the Sorority's bills;
6. send invoices for and collect chapter dues;
7. review chapter budgets;
8. maintain the database of promissory notes;
9. submitting the Sorority's taxes;
10. setting the GDP conversion for Canadian Chapters;
11. investing the Sorority's savings in order to maintain the financial stability of the Sorority.
12. votes on all legislation presented to the Board or to the Convention;
13. have charge and custody of, and be responsible for, all funds and securities of the Sorority, and deposit all such funds in the name of the Sorority in such banks, trust companies, or other depositories as shall be selected by the Board;
14. receive, and give receipt for, moneys due and payable to the Sorority from any source whatever;
15. disburse or cause to be disbursed the funds of the Sorority as may be directed by or under authority of the Board, taking proper vouchers for such disbursements;

16. keep and maintain adequate and correct accounts of the Sorority's properties and business transactions, including accounts of its assets, liabilities, receipts, disbursements, gains, and losses;
17. exhibit at all reasonable times the books of account and financial records to any Director, or to a Director's agent or attorney, or to any person or agency entitled by law to examine the same, on request therefor;
18. render to the President and Directors whenever they so request an account of any or all transactions as Treasurer and of the financial condition of the Sorority; and
19. if required by the Board, give a bond for the faithful discharge of such Treasurer's duties in such sum and with such surety or sureties as the Board shall determine.

Committee Assignments:

Finance and Promissory Note.

## Secretary

In addition to her duties provided in the Act of the Bylaws, the Secretary shall:

1. record the minutes of all official meetings;
2. facilitate the approval of monthly meeting minutes;
3. post meeting minutes to the Sorority Website;
4. maintaining the most recent revisions of all documents;
5. reviewing Event Planning Forms;
6. investigating Risk Management Support Form;
7. maintaining all original copies of members' signed Risk Management Forms and overseeing chapter audits;
8. certify and keep at the Principal Office of the Sorority the original or a copy of the Sorority's Bylaws as amended or otherwise altered to date;
9. keep at the Principal Office of the Sorority or at such other place as the Board may order, a book of the minutes of all meetings of the Directors and the Executive Committee, recording therein the time and place of holding, whether regular or special, and how authorized, the notice given, the names of those present and the proceedings thereof;
10. see that all notices are duly given in accordance with the provisions of the Sorority Bylaws or as required by law;
11. be custodian of the records and of the seal, if any, of the Sorority;

12. exhibit at all reasonable times to any Director of the Sorority, or to such Director's agent or attorney, or to any person or agency authorized by law to examine them, on request therefore, the Bylaws, the minutes of the proceedings of the Directors and other records of the Sorority;
13. in general, perform all duties incident to the office of Secretary and such other duties as may be required by law, by the Articles of Incorporation of this Sorority, or by these Bylaws, or which may be assigned from time to time by the Board;
14. votes on all legislation presented to the Board or to the Convention;
15. signs charter certificates;
16. defines and oversees all administrative procedures; and
17. defines and oversees all Risk Management responsibilities.

Committees Assignments:

Risk Management, Chapter Audit, and History.

## Director of Chapter Services

The Director of Chapter Services (CS) advises chapters on all matters. The Director of Chapter Services also reviews all chapter paperwork and updates to the Chapter Handbook, including candidate education. She is responsible for administering awards at the Sorority Convention. The Director of Chapter Services shall:

1. oversees the selection of, trainings and activities of the Chapter Advisors;
2. collects and maintains data on each chapter;
3. helps chapters maintain standard procedures;
4. acts as a link between the active chapters and the Board;
5. keeps in direct contact with all Regional Advisors;
6. oversees the selection of and activities of the Regional Advisors;
7. supervises the activities of the chapters;
8. keeps in direct contact with the New Chapter Advisors;
9. oversees the selection of the New Chapter Advisors;
10. assists the President with the Chapter installation ceremony;
11. votes on all legislation presented to the Board or to the Convention;
12. responsible for the props and equipment, including active pins, for the chapter installation ceremony;



13. orders new charters for newly established chapters;
14. orders membership certificates for members of newly established chapters; and
15. submit enrollment and graduation information to the Member Relations Committee.

#### Committees Assignments:

Regional Advisors and Chapter Advisors

## **Directors At-Large**

The Directors At-Large focus mainly on the strategic and long-term planning needs of the Sorority. The Director At-Large shall:

1. participate in Board Meetings;
2. may have various responsibilities and special projects that serve short and long term needs of the Sorority;
3. votes on all legislation presented to the Board or to the Convention;
4. attend the International Convention; and
5. submit an annual report to the President by the International Convention.

## **Past President**

The Past President will support the President and act as an ambassador of the Sorority. The Past President shall:

1. advise and support the President in her duties;
2. participate in Board meetings;
3. will not have a vote on the Board;
4. assist President with committees as necessary;
5. receive special assignments from the President; and
6. attend the Sorority Convention.

## **Foundation Chairman**

The Foundation Chairman will represent the Foundation and act as a liaison between Foundation and the Board. The Foundation Chairman shall:

1. participate in Board meetings; and
2. will not have a vote on the Board.

## Path of Advancement

If you want to be on the Board or hold one of these offices in the future, there are some things you can do to prepare you for the position you want to hold. Below is each Director position with a suggested path of advancement to one day become that Director. If becoming a Director is a goal of yours, please let the current Board know so we can help you reach your goal!

### President

*Requirements to Serve:* Previously served on the Board of Directors.

*Suggested:* Serve on the Governance Committee to help understand the ins-and-outs of the Bylaws and governing documents. Serve on the Finance Committee to understand the financial capabilities of the Sorority. Serve on Risk Management Committee to help understand the insurance side of the Sorority.

### Vice President

*Requirements to Serve:* Alumna in good standing.

*Suggested:* Serve on the Governance Committee, and preferably as Governance Chair. Governance Chair manages all pending bylaws and tracks and assigns reviews. As a Governance Committee member, work on both bylaw edits and colony reviews which are more intense. Also volunteer to review bylaw proposals which the Vice President will have to go through at Convention. Volunteering with FIRST will also be beneficial.

### Treasurer

*Requirements to Serve:* Alumna in good standing.

*Suggested:* Serve on any of the committees under the Treasurer, especially the Finance Committee. Knowledge of taxes, financial planning, electronic payments, and bookkeeping is preferred.

### Secretary

*Requirements to Serve:* Alumna in good standing.

*Suggested:* Serve on any of the committees under the Secretary, especially the Risk Management Committee. Ask to be on phone calls with the Secretary and our insurance brokers to find out how RM claims are handled. It may also be helpful to have been an Chapter Advisor who has had to complete a chapter audit to understand the process.

### Director of Chapter Services

*Requirements to Serve:* Alumna in good standing.

*Suggested:* Serve at least one year as an Chapter Advisor for a chapter that is not your own. It is helpful to have interaction with other chapters than the one you come from to see other perspectives. May have the opportunity to serve as a Regional Advisor prior to becoming Director of Chapter Services.

#### Directors At-Large

*Requirements to Serve:* Alumna in good standing.

*Suggested:* Serve on any of the committees. Have some experience in strategic planning.