



DELTA SIGMA THETA SORORITY, INCORPORATED

A Service Sorority Founded in 1913

1707 New Hampshire Avenue N.W., Washington, DC 20009 | (202) 986-2400 | Telefax (202) 986-2513

June 2018

Greetings Sorors,

It is my pleasure to announce that the 2018 revision of *The Chapter Management Handbook* is available for download in the Members Only Section of the National Website and on the Delta App. *The Chapter Management Handbook* is available as an electronic download to all members and Chapters of Delta Sigma Theta Sorority, Inc.

As a soror, leader, and member of Delta Sigma Theta Sorority, Inc. it is imperative that you read and become familiar with the information contained within the Chapter Management Handbook as well as the official documents that are referred to throughout the Handbook. Additionally, every Delta chapter should print at least one hardcopy of the document and place the copy in a three-ring binder as the chapter's official copy of *The Chapter Management Handbook* and for placement on the ceremonial table during the ritualistic Chapter Meeting Opening Ceremony.

The Chapter Management Handbook becomes effective immediately and outlines the information and materials needed to guide your chapter in planning and implementing successful programs within the community. Please utilize this comprehensive Handbook to assist in providing guidance and direction regarding policies, procedures and standards of the Sorority.

Sisterly and sincerely,

Cheryl A. Hickmon

Cheryl A. Hickmon
National First Vice President
Chair, National Scholarship and Standards Committee



CHAPTER MANAGEMENT HANDBOOK

Delta Sigma Theta Sorority, Incorporated
1707 New Hampshire Avenue, NW
Washington, DC 20009

Revised January 2018

CHAPTER MANAGEMENT HANDBOOK

2018 Revision

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*A Message From Our
National President*

My Dear Sorors –

I am pleased to share our revised and updated Delta Sigma Theta Sorority Chapter Management Handbook. Our Scholarship and Standards Committee has taken time to gain input from local chapter officers, taken into consideration the issues that our chapter leaders face in managing their chapters and completed a detailed review of the tools and guides that are needed to manage your chapters. The intent has been to ensure they were able to create a comprehensive guide for leaders and members alike to manage and work effectively for the success of our local chapters. Our hardworking local chapters are the lifeblood of our beloved sisterhood and it is essential that we provide you with guidance and reference materials to make that job easier as you go about the business of Delta.

This document is intentionally being provided as an online tool to give us the flexibility to provide “just-in-time” changes and revisions, as needed, so current information on chapter management and policies are more readily available to you. You will also find website links to Delta’s reference materials embedded in this document for ease of locating Delta’s policies, procedures and standard processes.

It is suggested that your Executive Boards take the time to go through this material as a team to facilitate a common understanding of chapter management.

As the voice and face of Delta Sigma Theta Sorority in your communities my prayer is for your success, prosperity and longevity as you actualize our vision of joy in our sisterhood... power in our voice... and service on our heart.

Yours in Delta –

Beverly Smith

Beverly E. Smith
National President & CEO
Delta Sigma Theta Sorority, Incorporated

MISSION STATEMENT

Delta Sigma Theta Sorority, Incorporated is an organization of college educated women committed to the constructive development of its members and to public service with a primary focus on the Black community.

CODE OF ETHICS

Believing in the worth and dignity of each human being, Delta expects each soror to recognize the supreme importance of the pursuit of truth, devotion to excellence, and commitment to social responsibility. Each soror is expected to live up to these ideals by embracing and adhering to the following ethical principles:

- ▲ Each soror shall regard as primary the bond of Sisterhood and the giving of public service.
- ▲ Each soror shall uphold the Constitution and Bylaws of Delta Sigma Theta Sorority, Incorporated.
- ▲ Each soror shall maintain high standards of personal conduct.
- ▲ Each soror shall support and promote the goals, objectives and programs approved by Grand Chapter.
- ▲ Each soror shall treat all persons with dignity and respect.
- ▲ Each soror shall exhibit compassionate and courteous behavior toward sorors at all times.
- ▲ Each soror shall refrain from making false or misleading statements about the Sorority to anyone.
- ▲ Each soror shall recognize her personal responsibility to assist with and promote the development, improvement, and execution of programs designed to strengthen the Sisterhood.
- ▲ Each soror shall uphold and support all persons impartially.

- △ Each soror shall refrain from engaging in or tolerating any exploitation or disparaging of the Sorority.
- △ Each soror shall refrain from using her membership in a manner that would be inconsistent with the Sorority's underlying principles.
- △ Each soror shall maintain the confidentiality of all information deemed as such by the Sorority.
- △ Each soror shall refrain from using the Sorority's property, including any derivative of its name, its symbols, and other trademarks and service marks, for personal and/or commercial use.
- △ Each soror shall exercise sound business principles in conducting the Sorority's affairs.
- △ Each soror shall refrain from engaging in illegal and unsisterly conduct (including any form of hazing); shall use her best efforts to protect the Sorority from any such conduct by anyone; and shall report any such conduct to the appropriate local, regional or national officer.
- △ Each soror shall support the Sorority's programs through the payment of all dues and fees approved by Grand Chapter; and
- △ Each soror shall demonstrate her commitment to public service by participating with her local chapter or nationally.

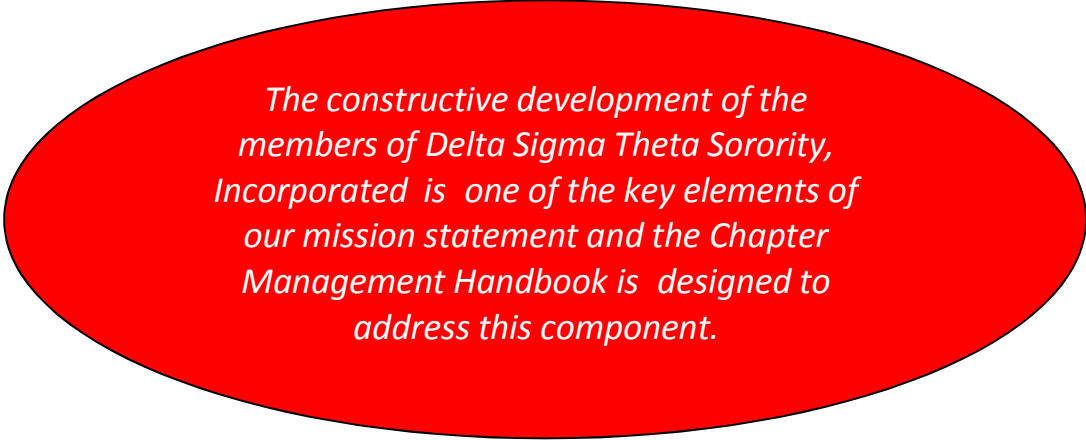
INTRODUCTION

The **Chapter Management Handbook** is designed to meet the needs of both the newly initiated and experienced chapter member, those elected and appointed chapter officers, committee chairs and committee members.

The National Scholarship and Standards Committee has revised the Chapter Management Handbook with the intent of providing step-by-step guidance to navigate, plan, and execute chapter meetings and programs, and help members learn to work within our beloved sisterhood. The National Scholarship and Standards Committee wanted to answer the question, “What should I, as an officer/chair/committee member/chapter member, be doing now?”

Throughout the year, the National Scholarship and Standards Committee and Delta leadership will provide updates to various processes and procedures that will enhance the efficiency and effectiveness of chapter operations. Please read, review, and share the latest policy and procedural changes affecting the chapter and/or chapter members regularly.

The Regional Director, Regional Representative, and Regional Member of the National Scholarship and Standards Committee are available to assist you with any questions or concerns that you may have regarding any of the processes and procedures contained within this handbook. Please reach out to them with any questions, comments, and/or concerns.



The constructive development of the members of Delta Sigma Theta Sorority, Incorporated is one of the key elements of our mission statement and the Chapter Management Handbook is designed to address this component.

SECTION I

CHAPTER MANAGEMENT: OVERVIEW

OVERVIEW

It is the chapter's policies, procedures, plans, programs, and structure that establish the roles and responsibilities of the chapter officers and members.

While the authority to direct and control the chapter's programs rests with the chapter leadership, the chapter membership—through its involvement on the various committees—creates, and then implements the chapter's programs.

Chapters within Delta Sigma Theta Sorority, Inc., operate in a manner that may be considered top-down/bottom-up. The chapter officers and committee chairs set the tone and theme for the chapter, and then rely on the committees to develop the actual plans.

Merriam-Webster Dictionary defines a chapter as "a local branch of an organization."

In Delta Sigma Theta Sorority, Incorporated, chapters are the lifeline of the Sorority in that chapters put into operation the programs, policies and procedures of the Sorority.

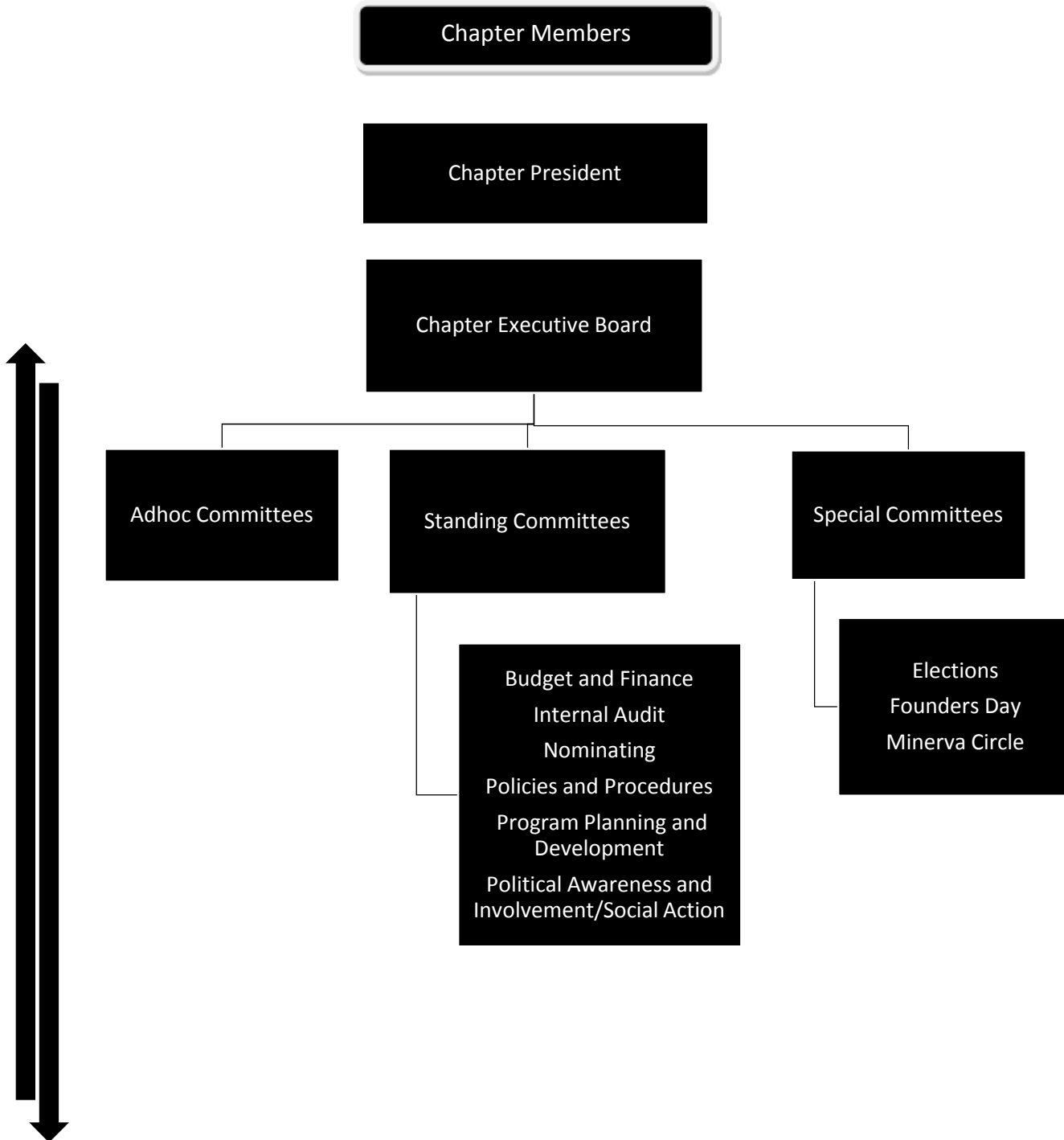
CHAPTER STRUCTURE AND ORGANIZATIONAL CHART

It is the responsibility of chapter officers to ensure that the chapter continues to thrive and grow.

To accomplish that task, chapter officers should provide well-planned programs with proper balance so that the programs will interest all of the chapter members, understanding the various generations, and what may be important to each generation.

Once the programs have been developed by the designated committee, the chapter executive board reviews the program plans and makes recommendations whether or not the program(s) should be presented to the general body for approval. Thus, the chapter officers cannot function without the membership, and the membership cannot function without the chapter officers.

CHAPTER STRUCTURE ORGANIZATIONAL CHART



RESPONSIBILITY OF THE CHAPTER TO GRAND CHAPTER AND CHAPTER MEMBERS

The chapter (meaning its officers) has a major responsibility to the chapter member(s), particularly if the chapter is to thrive and grow.

For instance, it is important for the chapter officers to:

- △ Provide well-planned programs with proper balance so that the programs will interest all of the chapter members; and
- △ Understand the various generations, and what may be important to the particular generation.
 - Alumnae chapter members will span all of the generations from college-aged to retiree.
 - Collegiate chapter members will be comprised of members attending the college or university. However, it still is important to understand the diversity of ages, experiences, and geographical and cultural backgrounds of the collegiate members.

In order to carry out its purpose, the chapter must occupy an important place in the lives of all of its members, and must assume certain responsibilities including:

- △ Providing vital programs which are beneficial, challenging, and varied enough to appeal to the different interest and age groups in the chapter;
- △ Ensuring an atmosphere that promotes sisterhood and friendliness at meetings; and
- △ Promoting opportunities for learning and active participation in purposeful programs whether service, educational, and/or social.

In addition, it is the responsibility of the chapter officers to:

- △ Begin and end meetings on time;
- △ Inform the membership of current and relevant information and activities;
- △ Provide each member with the appropriate copies of chapter documents (e.g. calendar, minutes, roster, financial reports, budgets, Rules of Order Form and Policies and Procedures);

- △ Encourage participation in every part of the meeting;
- △ Listen to and seek clarity from members;
- △ Plan the time, place, and frequency of meetings so that they are convenient for a majority of chapter members;
- △ Have a friendly and relaxed relationship between the officers and members; and
- △ Evaluate programs periodically and change programs when conditions warrant.

CHAPTER GENERAL ACCOUNTABILITY

Chapter accountability begins with the officers. The rules governing chapters are outlined in ARTICLE III – CHAPTERS of the *Constitution and Bylaws*. Chapter officers should know and understand that all Chapters shall:

- △ Be governed by Grand Chapter
- △ Promulgate Rules of Order and Policies and Procedures to be submitted to their Regional Member of the National Scholarship and Standards Committee for review and approval, and thereafter when amended by two-thirds vote of the chapter members present and voting.
- △ Be represented at each national convention and at the chapter's respective regional conference, unless an official excuse has been granted by the National Secretary.
- △ Request to receive special dispensation to function during any given sorority year with less than the required number of members.
- △ Submit payment of dues and fees and proper forms, and reports as required by Grand Chapter. Special attention must be given to filing of fees and pertinent membership intake forms.

In an effectively managed chapter, both chapter officers and members fulfill their responsibility to the chapter. Both officers and members must be engaged in order for the chapter to operate. Delta Sigma Theta Sorority, Inc. has governing documents and administrative resources and tools to assist chapter officers in the governance of their chapter and to provide the authority for certain decisions.

- △ All chapters should have copies of the most recent governing documents and administrative tools of the Sorority.
- △ Members also should have personal copies of the most recent governing documents and administrative tools of the Sorority, and should become familiar with each.
- △ All of the governing documents and administrative tools are available on the Delta Sigma Theta Sorority, Inc. website in the Members Only Portal, or in the case of *Robert's Rules of Order, Newly Revised*, it is available for purchase on the Internet (i.e., Amazon.com) or in a commercial bookstore.

GOVERNING DOCUMENTS

Constitution and Bylaws

The *Constitution and Bylaws* is the principle authority for the governance of the Sorority after the Corporate Charter. It is the fundamental law stating the purpose or object of the Sorority. It defines the structure, the jurisdiction, membership eligibility, constituent units (chapters/regions) and provides for classification of membership, governance of the organization and participation in the electoral process.

It may be amended by a two-thirds vote of the delegates assembled in the national convention. Notice of proposed amendments must be submitted by the National Constitution and Bylaws Committee to chapters by December 31st before the convening of the national convention. It is revised after each national convention as per the vote on the recommended revisions by the voting delegates in attendance.

Robert's Rules of Order, Newly Revised

The current edition of *Robert's Rules of Order, Newly Revised* is the recognized authority on parliamentary procedure. When there is not an applicable section in the *Constitution and Bylaws* then the current edition of *Roberts Rules of Order, Newly Revised* becomes the ruling parliamentary authority.

Chapter Rules of Order

The chapter's rules of order define who the chapter is and provides a snapshot of the chapter structure.

Chapter Policies and Procedures

A chapter's policies and procedures is a very important and unique document that comprises the fundamental rules defining the chapter. These policies and procedures are written and approved by the chapter itself. Well-written and effective policies and procedures allow chapters to meet constitutional requirements, work effectively, solve problems, make wise decisions, maintain

control and manage chapter affairs. They also help the chapter presiding officer run effective and efficient meetings.

ADMINISTRATIVE RESOURCES AND TOOLS

The ***Ritual*** is a historic document that expresses in words and ceremonial actions the core meanings of our founding principles. For uniformity purposes, it provides the preparations, instructions, and illustrations for conducting well-planned, beautiful and inspiring ceremonies.

Protocol and Traditions Manual sets forth the practices and social interactions that form the basis of our communal life. It also provides clear and authentic descriptions of the traditions and protocol of Delta Sigma Theta Sorority, Inc.

Chapter Management Handbook is prepared for chapters to give guidance and direction in policies and procedures and the proper perspective in relation to leadership needed to implement, strengthen and coordinate activities of the local chapters. It grew out of a need for consistent interpretation of the Sorority's policies and procedures. The National Scholarship and Standards Committee requires each chapter to have a copy of the Chapter Management Handbook.

Code of Conduct consists of two parts: **Code of Ethics**, which states the type of conduct that the Sorority considers acceptable; and **Disciplinary Action Code**, which sets forth the behaviors that the Sorority deems unacceptable.

Administrative Procedures for Membership Intake Manual is the official procedural guide for administration of the Membership Intake Program from the initial to the ending stages.

The Membership Intake Program contains all of the programmatic elements for Membership Intake beginning with the Nine Principles, Calendar, and the Six Components of the Membership Intake Program.

The Pyramid Study Guide provides information on the history and traditions of Delta Sigma Theta Sorority, Inc. and prepares pyramids for membership in the organization. Mastery of the material contained therein will lead to successful completion of the Delta Achievement Test. The major goal of the Membership Intake Program is to gain from each initiate a commitment to the ideals, values and public service mission of Delta Sigma Theta. By learning Delta's history and its proud traditions, a pyramid begins to internalize and develop an appreciation for the strong belief system that is the foundation for all that Deltas do in the name of the Founders and our fundamental principles. The acquisition of this "historic memory" means knowing how Delta Sigma Theta's history relates to the

Black experience and cultivates pride in the achievements of Black people, women and the Sorority.

Fiscal Officers Manual provides policies and procedures for the fiscal operations of local chapters. It should be used to assist chapters in developing and reviewing local fiscal policy that ensures appropriate internal controls are in place to safeguard and account for the chapter's assets. The National Finance Committee is responsible for updating the Fiscal Officers Manual, and for training the chapter's fiscal officers.

Internal Audit Manual provides policies and procedures for the audit of local chapters of Delta Sigma Theta Sorority, Incorporated. It should be used to assist chapters in conducting audits to ensure appropriate internal controls are in place to safeguard and account for the chapter's assets.

Delta Internet Guidelines (DIG) outlines Delta's guidelines pertaining to various aspects of the Internet including websites, email, social media, and the use of merchant accounts. It has been prepared in the interest of:

- △ Protecting Delta Sigma Theta Sorority, Inc. and minimizing potential legal liability.
- △ Providing a framework for regions, chapters, and individual sorors to communicate via the internet.
- △ Assisting the organization in efficient and effective operation.

Delta has intellectual property interests in its symbols, ceremonies, and other materials which need protection from legal risks. Therefore, accurate, complete and current information is critical to legal protection.

The Delta Internet Guidelines (DIG) is maintained by the National Technology Committee and has been approved by the Scholarship and Standards Committee, which is responsible for enforcing the policies and procedures of the Sorority.

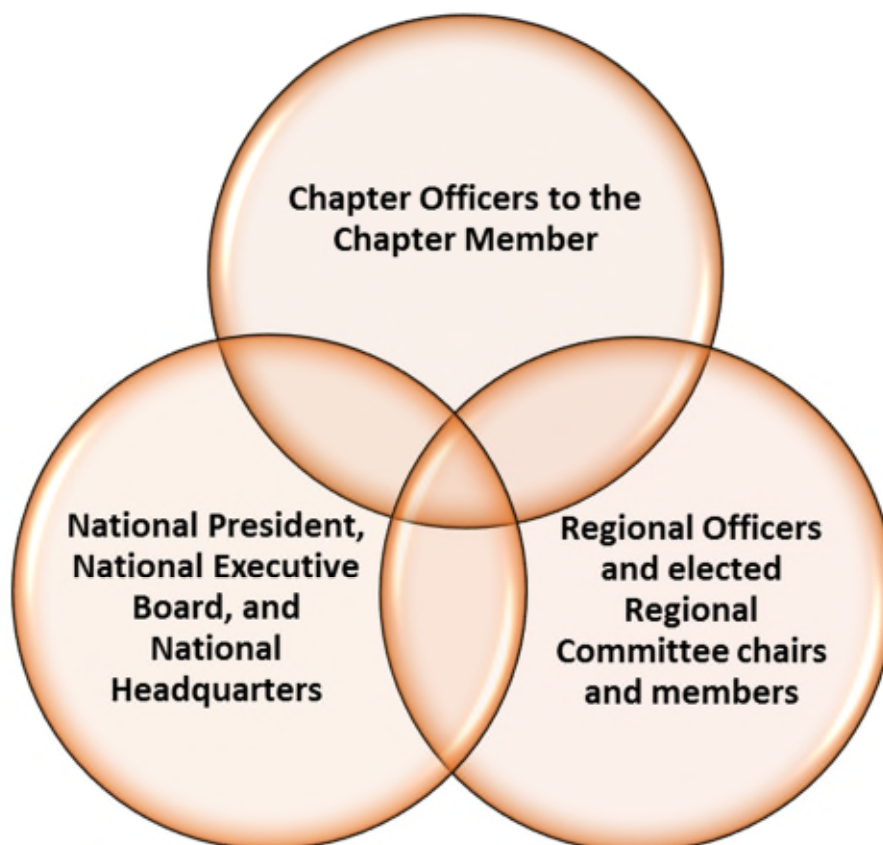
Delta Style Guide is a writing guide that is used to ensure consistency in the Sorority's communications. It is divided into three sections: *Delta Words and Phrases, Common Words and Phrases, and Social Media*.

The a-b-c's of Parliamentary Procedure is a pocket guide to *Robert's Rules of Order* that outlines meeting agendas and the typical order of business; the five general types of motions; and procedures for proposing, discussing, and voting on motions. It also provides a clear, at-a-glance chart explaining the types of motions and the rules associated with them.

CHAPTER COMMUNICATIONS

The channel of communications, a valuable arm of any organization, is the most important link to understanding the Sorority. Therefore, the communications process in Delta Sigma Theta Sorority, Inc. must remain open within Grand Chapter.

The need for communication from the chapter officers to the chapter members, regional officers and elected regional committee chairs and members, National President, National Executive Board, and National Headquarters cannot be over-emphasized.



On the chapter level, shared leadership is the process through which the chapter officers hold joint responsibility for the chapter's successes. Constant and consistent communications from chapter officers should include the sharing of personal skills, ideas and resources with one other.

An organization whose leadership communicates effectively will:

1. Experience fewer of the misunderstandings that create friction between people, and
2. Not waste time, causing mistakes to occur.

*Effective communication is an important element of success
for every organization and its leaders.*

As leaders, chapter officers and committee chairs/members need to:

- △ Identify efficient and cost-effective ways to disseminate information throughout the chapter.
- △ Understand that it is of the utmost importance that information is transitioned when there is a transition of officers. Effective transition of officers provides for chapter continuity and communication.
 - In transitional chapters and chapters with predominately military members, the transition of chapter officers is of paramount importance. Newly elected/appointed chapter officers and/or committee chairs/members should not have to guess what occurred prior to their administration, nor should they have to recreate programs.
- △ Transition all documents, binders, important/instructive emails, notes, etc., to the incoming chapter officers and/or committee chairs/members. *(The transition of chapter officers is discussed in more detail in Section II of this Chapter Management Handbook.)*

“A lot of people resist transition and therefore never allow themselves to enjoy who they are. Embrace the change, no matter what it is; once you do, you can learn about the new world you're in and take advantage of it.”

Soror Nikki Giovanni

CONFIDENTIALITY OF DOCUMENTS

Governing Documents/Administrative Tools

- △ The information contained in Delta Sigma Theta Sorority, Inc.'s governing documents and administrative resources and tools is only for members and sorors of Delta Sigma Theta Sorority, Inc. *(with the exception of the Pyramid Study Guide, which is also for pyramids).*
- △ Please keep the governing documents and administrative tools in a safe place and do not share them with other individuals outside of the Sorority. *Robert's Rules of Order* and the *a-b-c's of Parliamentary Procedures* are the exception to this statement since they are for public consumption.

Membership Directories and/or Rosters

A chapter's membership directory or roster containing names, photos, or contact information for current chapter members is confidential, privileged and only for the information of the intended recipient. It may not be used, published or redistributed without the prior written consent of Delta Sigma Theta Sorority, Inc.

Past Chapter Membership Information

Past chapter membership information is confidential, privileged and only for the information of the intended recipient and may not be used, published or redistributed without the prior written consent of Delta Sigma Theta Sorority, Inc.

This includes:

- △ Past Chapter Lines or "Lineage"
- △ Birth names, legal names, or "line names" of members initiated into a chapter during a specific year
- △ "Ship" names or the names of entire membership intake lines

SECTION II

CHAPTER MANAGEMENT: OPERATIONS

TRANSITION

Chapter Transition

After new officers, committee chairs and committee members have been elected or appointed, there must be a transition meeting between all of the outgoing and incoming members. This transition meeting should occur prior to the new officers, committee chairs and members assuming their offices on July 1.

This transition is designed to:

- △ acquaint the new officers, committee elected and appointed chairs and members with rules, regulations, procedures, and managerial tasks;
- △ enable them to obtain a basic knowledge of principles, operations, and conceptual framework; and
- △ assist them in obtaining a thorough knowledge of the functions and business aspects related to the office/position and other routines.

The members elected should have knowledge of the fundamentals of Delta Sigma Theta Sorority, Inc. However, the transition phase gives time for them to further deepen and sharpen their knowledge of Delta Sigma Theta Sorority, Inc. and offers limited time to work along with the outgoing members on matters (1) germane to continuity and (2) those that require immediate attention.

REMEMBER

THE "TRANSITION CHECKLIST" MUST BE COMPLETED BY ALL OUTGOING OFFICERS, COMMITTEE CHAIRS, AND COMMITTEE MEMBERS.

The transition checklist should enable a more thorough and smoother transition by bringing attention to pertinent areas. It focuses on:

- △ Outstanding requests that need to be addressed
- △ Pending problems that need to be resolved
- △ Priorities underway that should be continued
- △ Important dates and commitments made [indicate if tentative or firm, contact person(s) and telephone numbers(s)]
- △ Files and correspondence to be turned over to the incoming officers
- △ Copies of budget, records and reports submitted to National Headquarters during the past year(s)
- △ All financial records, including but not limited to ledgers, journals, bank deposit tickets, deposits, evidence of investments, properties owned, cancelled checks, bank statements, receipt books, check register, listing of payable and receivable accounts, audit reports and any other financial statements (for chapters)
- △ Recommendations or suggestions that would provide improvement
- △ Basic equipment purchased or rented that should be transferred to the incoming officers
- △ Review of past year's calendar of activities and suggestions for the upcoming year

Training beyond that given during the initial transition meeting should be encouraged, i.e., workshops and seminar attendance; acquisition of: the administrative tools, Grand Chapter *Constitution and Bylaws*, Delta's history, heritage and traditions; reporting and record-keeping responsibilities; national priorities; and financial information and training.

Transition should be on-going!

Transition Meeting

1. Persons **required** to attend the transition meeting:
 - △ All outgoing and incoming elected officers
 - △ All outgoing and incoming appointed officers
 - △ All outgoing and incoming chairpersons
 - △ Chapter Advisor and all Chapter Advisory Council members (if applicable)
2. At this meeting, the Transition Checklist and all records (including all audited financial records and the chapter checkbook) must be turned over to the incoming members.
3. Copies of all Administrative Tools should be turned over immediately to the newly elected president.
4. Chapter officers must be reminded to:
 - △ Immediately change the signatures on the bank cards (president, treasurer, and financial secretary)
 - △ Plan chapter meetings
 - △ Always coordinate with the Advisor concerning meetings (collegiate chapters)
 - △ Hold executive committee meetings prior to the regular chapter meetings
 - △ Use *Robert's Rules of Order, Newly Revised* to conduct meetings
 - △ Designate a regular meeting time and a regular meeting place

The goals are to give the guidance and assistance necessary to enable the officers to perform well and on their own. It is expected that the officers' proficiency levels will be elevated so that the skills acquired can be taught to other chapter members.

Delta Sigma Theta Sorority, Incorporated Transition of Chapter Officers Chapter Transition Checklist Summary

A Chapter Transition Checklist Summary should be completed and submitted through the Red Zone immediately following the chapter transition meeting. Failure to submit the following Chapter Transition Checklist Summary will result in chapter non-compliance.

Transition Form

*Date Reported:	_____
Ending Fiscal year:	_____
Transition Meeting Date:	_____
Transition Checklist Completed:	_____
All Records Transitioned	_____
Follow-up Meeting Date	_____
Chapter's Annual Report Completed:	_____
Financial Report and Fed Income Tax Group Return:	_____
President's Acceptance of Fiduciary Form:	_____
Treasurer's Acceptance of Fiduciary Form:	_____
Assistant Treasurer's Acceptance of Fiduciary Form:	_____
Financial Secretary's Acceptance of Fiduciary Form:	_____
Assistant Secretary's Acceptance of Fiduciary Form:	_____
Internal Audit Chair's Acceptance of Fiduciary Form:	_____
Annual Audit Report:	_____
Chapter Management Handbook:	_____
Chapter Policies and Procedures:	_____
Chapter's Rules of Order Form:	_____
Chapter's Official Ritual:	_____
Chapter's Protocol and Traditions Manual:	_____
Chapter's ABC's of Parliamentary Procedures:	_____
Chapter's Robert's Rules of Order, Newly Revised:	_____
Bank Signature Cards:	_____
Chapter's Checkbook:	_____
Audited Financial Records:	_____
Access Codes:	_____

Responsibilities of Outgoing and Incoming Officers

The period between election and assumption of duties for the new officers is the perfect time for collaborative efforts between incoming and outgoing officers.

This time offers the opportunity for the outgoing officer to share typical tasks associated with their office and highlights of their administration. This also is a positive way to provide continuity in chapter administrative and program activities.

The outgoing officer has the sole responsibility of closing out all chapter requirements for compliance and submitting all paperwork to National Headquarters for the year.

The incoming officer is a participant in all chapter related administrative activities. She shall be attentive and open to actively observing administrative activities during this transition period.

Roles and Responsibility Matrix

Typical end of year Chapter activities following Elections	Outgoing Officer (President)	Incoming Officer (President)
Day of Election (April or May)	Presiding at Meeting	
First Executive Board Meeting following Election of Officers	Presiding at Meeting	Attends as observer; views process of determining agenda for meeting
Last chapter meeting (May or June)	Presides at the opening of the meeting; after installation, sits with the chapter members	Attends meeting; Participates in Installation of Officers Ceremony. She closes the meeting after installation.
Installation of Officers Ceremony (May or June)	Identifies presiding officer for installation ceremony in accordance with the <i>Ritual</i> ; after installation of new officers, remains responsible for all chapter compliance reports; continues to authorize and sign checks – openly sharing this information with the newly installed president; continues to call meetings of Executive Board for the purpose of transitioning and completing all paperwork.	Participates in installation ceremony in accordance with the <i>Ritual</i> ; following installation, newly installed president makes speech and closes meeting; works with outgoing officer during the transition month (May or June); observes outgoing president as she authorizes and signs checks through the end of outgoing officer's term (May or June); becomes familiar with financial policies and procedures as well as chapter budget.

Typical end of year Chapter activities following Elections	Outgoing Officer (President)	Incoming Officer (President)
Financial transactions at last chapter meeting of the year	Works with the fiscal officers to ensure that financial responsibilities are maintained; assists in scheduling time for the treasurers to meet separately; makes certain the outgoing treasurer escorts the incoming treasurer to the bank for introductions.	Incoming president and incoming fiscal officers view processes; work with the outgoing officer to ensure that the incoming treasurer goes with outgoing treasurer to the bank for introductions.
Chapter Compliance Reports	Compiles the reports, and provides copies for review by incoming officer.	Observes and works with the outgoing officer to complete reports
Financial Reports	Primary responsibility for completion along with outgoing treasurer. Ensures that all fiscal officers follow the fiscal officers transition guidelines stated in the latest Fiscal Officers Manual.	Observes and works with the outgoing officer to complete reports; makes sure that the incoming treasurer works with outgoing treasurer.
Transition Meeting	Arranges the meeting with all outgoing officers and committee chairs; sets agenda; last time to authorize and sign checks, etc.; arranges for bank signature cards to be signed and all books/documents to be given to incoming officers before or during the transition meeting; completes transition checklist.	Attends meeting; (installed president has begun to make chair appointments to committees;) invites newly installed elected and appointed officers, and committee chairs to attend transition meeting; observes the authorization and signing of all checks by outgoing president; signs bank signature cards along with incoming fiscal officers.
Access to RED Zone; Submission of Report of Chapter Officers	Final action in RED Zone to occur before/during the transition with the incoming officer.	Views process; receives all codes.

Typical end of year Chapter activities following Elections	Outgoing Officer (President)	Incoming Officer (President)
July 1 st	All duties are relinquished to incoming officer.	Formally assumes duties; fills any vacancies of elected officers in accordance with chapter's policies and procedures; calls appropriate meetings; sets executive board agenda and plans meetings.

CORPORATE ACCOUNTABILITY AND COMPLIANCE

Chapter Responsibilities

As the newly elected officer(s) or returning chapter officer(s), it is important to understand that it is the responsibility of each chapter to meet the corporate requirements of the Grand Chapter by annually submitting the required fees, reports and forms listed on the **Corporate Accountability Form by the due date**.

- △ The Corporate Accountability Form is a checklist, comprised of items which are chapter requirements, and is retained in the chapter's files.
- △ The Corporate Accountability Form is available to chapters in the **RED** Zone.
- △ Chapter compliance is determined by the actual record of submission of required forms, reports and fees, submitted to National Headquarters.

The actual required information **must** be submitted by the required deadline dates, which are listed on the Corporate Compliance Chart on the next page. This chart includes a detailed description of each compliance component and its purpose. All of the required compliance forms are available in the **RED** Zone.

- △ The **Chapter Liability Insurance Fee Schedule** is included in the latest Fiscal Officers Manual

Collegiate Chapters have three additional corporate accountability responsibilities:

- △ The Annual Review Acknowledgement Form
- △ The GPA Compliance Report Form
- △ The Inactive Chapter Member Report Form

Forms are available in the **RED** Zone.



With the exception of the Financial Compliance Forms, the Due Date for the majority of the Corporate Compliance Forms is June 30th.

Corporate Compliance Checklist

Description	Due Date
Annual Dues -- Local and National	January 1 – March 31
Per Capita Improvements Fund Fee (\$10 -- due same time as Local and National dues)	January 1 – March 31
National Corporate Fees (Alumnae \$50 -- Collegiate \$25 each)	March 31
Regional Corporate Fees (Alumnae \$50 -- Collegiate \$25 each)	March 31
Annual Chapter Liability Insurance	March 31
Annual Chapter Bonding Insurance	March 31
Chapter Demographics Reporting Form	June 30
Annual Report of Chapter Officers Form (AROCO -- 2 Parts)	June 30
Transition Checklist Summary	June 30
Advisors Certification Form (The RD MUST approve ALL collegiate advisors)	June 30
Projected Chapter Programs for the Ensuing Year (Chapter Calendar)	June 30
Chapter Rules of Order Form (REVISED)	June 30
Chapter Policies and Procedures	June 30
Chapter History Template	June 30
Risk Management Report	June 30
Annual Financial Report and Federal Income Tax Group Return Authorization	August 31
Internal Audit Report Form (IAR-1)(Annual Audit Form)	August 31
Acceptance of Fiduciary Responsibility Forms President/Treasurer/Financial Secretary/Internal Audit Chair and Assistant Treasurer/Assistant Financial Secretary, if applicable	August 31
External Audit/Review of Financial Statements (if applicable)	August 31
National 501(c)(3) Annual Registration Statement (if applicable)	August 31
Collegiate Chapters Annual Review Acknowledgement Form (NEW)	September 15
Collegiate Chapters GPA Compliance Report Form (REVISED)	Quarter/Semester
Special Dispensation Form (Collegiate <7 or Alumnae <12)	As Needed

Annual Review Acknowledgement Form

A meeting and/or presentation to review the University's Code of Conduct and/or Student Handbook must be held annually during the Fall Semester. The form must be completed for compliance and submitted to the Regional Director and the Regional Representative no later than **September 15th or prior to Fall Membership Intake.**

Inactive Collegiate Member

At the 52nd National Convention the Grand Chapter voted to raise the cumulative GPA requirement for collegiate members to a **2.75** on a **4.0** scale and a **1.75** on a **3.0** scale starting in the **fall of 2016**. If collegiate members fail to maintain the minimum cumulative GPA, the member(s) will be defined as inactive. For clarification, the following defines what can and cannot be done when a member is inactive.

Having an inactive status means collegiate members **MAY NOT** participate in the following activities:

- △ Collegiate soror **may not** attend chapter meetings, executive board or committee meetings.
- △ Collegiate soror **may not** be listed on any external or internal chapter material, e.g. program listings, correspondence, etc.
- △ Collegiate soror **may not** hold office, appointed or elected, including membership intake; if the soror currently holds an office or position, it must be relinquished.
- △ Collegiate soror **may not** represent the chapter at any NPHC activity; this includes programs and events held by the organization or University.

While being on inactive status, collegiate members **MAY** participate in the following:

- △ Collegiate soror **may** attend public chapter events and programs, but **not** participate in planning or any behind the scene activities.
- △ Collegiate soror **may** remain on the Chapter email list but not part of the **members only** list.
- △ Collegiate soror **may** attend any statewide meetings, etc.
- △ Collegiate soror **may** wear paraphernalia.

Chapter presidents and Advisors **must** submit a chapter roster to the appropriate University office e.g., Office of Student Affairs, etc. Primary Advisors must also submit an **Inactive Chapter Member(s) Report Form** to the Regional Representative, which lists the inactive members of the chapter they advise. They must also give each inactive member an **Inactive Member Status Letter**. This letter includes an academic plan that will be implemented to help inactive members. These forms have been added to the **Red Zone** under Compliance.

DELTA SIGMA THETA SORORITY, INCORPORATED

A Service Sorority
Grand Chapter

PROCESS FOR SUBMISSION OF COLLEGIATE CHAPTER MEMBERSHIP COMPLIANCE REPORT FORM GPA Reports

Primary Advisors shall be responsible for the completion, accuracy and submission of GPA reports no later than fifteen (15) days following the end of each semester including summer sessions. The form shall be completed with accurate information including the following:

- Collegiate member's name and classification
- GPA 2.75 and above (Yes or No)
- Semester GPA and Cumulative GPA
- Graduated Seniors should be listed in the Degree Conferred section ONLY

Information shall be obtained from student transcripts (hard copy or online) provided by the student or from university official. The primary advisor will be responsible for securing the information from these sources and completing the form. Documents (pdf fillable) shall be available to all advisors and hard copies and/or pdf files shall be submitted to the Regional Representative, Regional Director (cc) and National Headquarters.

STEP #1: Submit the completed GPA Compliance Report Form to the Regional Representative and Regional Director (cc) of your respective region via email.

REGION	REGIONAL REPRESENTATIVE/DIRECTOR	EMAIL ADDRESS
Central	Central Regional Representative Central Regional Director	centralrr@deltasigmatheta.org centralrd@deltasigmatheta.org
Eastern	Eastern Regional Representative Eastern Regional Director	easternrr@deltasigmatheta.org easternrd@deltasigmatheta.org
Farwest	Farwest Regional Representative Farwest Regional Director	farwestrr@deltasigmatheta.org farwestrd@deltasigmatheta.org
Midwest	Midwest Regional Representative Midwest Regional Director	midwestrr@deltasigmatheta.org midwestrd@deltasigmatheta.org
South Atlantic	South Atlantic Regional Representative South Atlantic Regional Director	southatlanticrr@deltasigmatheta.org southatlanticrd@deltasigmatheta.org
Southern	Southern Regional Representative Southern Regional Director	southernrr@deltasigmatheta.org southernrd@deltasigmatheta.org
Southwest	Southwest Regional Representative Southwest Regional Director	southwestrr@deltasigmatheta.org southwestrd@deltasigmatheta.org

STEP #2: Submit the completed GPA Compliance Report Form to National Headquarters via mail, fax or email.

MAIL	FAX	EMAIL ADDRESS
Delta Sigma Theta Sorority, Incorporated Membership Department Attention: Compliance 1707 New Hampshire Avenue, NW Washington DC 20009	202-986-2513	MemDept@deltasigmatheta.org

NOTE: The Primary Advisor shall complete and forward this form to the Regional Representative, Regional Director (cc) and National Headquarters, no later than fifteen (15) days following the end of each grading period including summer sessions.

- △ The Membership Department at National Headquarters has the responsibility for compiling and maintaining the Chapter Management Assessment Report (Compliance Report) which enumerates each chapter's compliance and non-compliance status in the required areas.
- △ The chapter's compliance status is located on the **RED** Zone. This provides the chapter the opportunity to view what items have been submitted and what items are outstanding.
- △ However, **it is the responsibility of the Regional Director to communicate the chapter's compliance status.**

If a chapter has questions regarding its **compliance** requirements, the chapter should email dstcompliance@deltasigmatheta.org or contact their **Regional Director**.

Chapter Corporate Accountability is the responsibility of each chapter, the chapter officers, and the members. "Any chapter failing to remit the required fees, reports and forms shall be inactive immediately, and shall not proceed with the chapter's programs or Membership Intake until all corporate requirements are met and the Regional Director declares that the chapter is in compliance."

Constitution and Bylaws, Article III – Chapters, Section 4. Chapter Responsibility, (C)

A REMINDER FOR CHAPTER MEMBERS

At the beginning of each chapter year, or at the first chapter meeting, the chapter president should announce the chapter's compliance status.

If the chapter president does not announce this, the chapter members should ask. An informed member is the best member! Everyone should take responsibility for knowing the chapter's corporate compliance status.

RED ZONE MANAGEMENT

The **RED** Zone is a web-based tool designed for Delta Sigma Theta Sorority, Inc. that allows chapter officers to perform chapter management operations. Due to the interactive processes utilized within The **RED** Zone, chapter officers will be required to access the system on a weekly basis at a minimum.

- △ The following officers/positions have access to the **RED** Zone: chapter president, treasurer, financial secretary, chair internal audit.
- △ The primary advisor for collegiate chapters will have “view only” access.
- △ If a member does not have access, she will receive an "access is denied" message.

In the **RED** Zone chapter officers are able to perform the following:

- △ Submit Dues
- △ Submit 25/50 Year Honorees
- △ Submit Deceased Members
- △ Submit Membership Intake Applicants
- △ Complete and Submit Compliance forms
- △ Obtain System Reports
- △ Membership Management

*If you are a newly elected president, you need to know how to navigate the **RED** Zone. The immediate past president, regional director or her designee, (or Advisor for collegiate chapters) should assist you in navigating the **RED** Zone. If one or all of them are not available, you should request assistance from your regional member of the National Scholarship and Standards Committee.*

Authorized Users should NOT grant access to any other persons.

Note for Collegiate Chapters: Once the primary advisor has been approved by the Regional Director, a member of the IS Department will add the advisor to the chapter’s record in iMIS so that the advisor will have the proper access in the **RED** Zone. She will log into The **RED** Zone and the drop down will list all chapters she has access to.

Screen shots of each section of “The **RED Zone” are provided for review:**

Task Center

the red zone

Task Center | Membership Management | Membership Intake | Compliance | Upload Fiduciary Forms | Request Help | Members Only | Sisters Only | Logout

Task Center > Snapshot

<p>Finance</p> <p>Your chapter currently owes \$0.00 in member dues based on submitted transmittals that we have not received payment.</p>	<p>Compliance</p> <p>Your chapter is <u> </u> in compliance.</p>
<p>Membership</p> <p>You currently have <u> </u> financial members.</p>	<p>Events</p> <p>No open events.</p>
<p>Welcome to The Red Zone.</p> <p>The Red Zone is a proprietary system developed exclusively for the leaders of Delta Sigma Theta Sorority, Inc. Use of this system is limited to purposes of chapter/regional management only.</p> <p>If you experience problems, the Help Desk is available 8:30 a.m. - 5:30 p.m. ET (M-F) at 202-986-2400 ext. 547, 549, or 562. In addition, you may select the Request Help tab to submit an email to report your problem.</p> <p>Please wait 10 minutes for calculations to complete before printing new transmittals.</p> <p>1. The Annual Financial Report - 990 is now</p>	<p>Required Actions</p> <p>Your chapter has 0 pending membership transactions that are pending or require paperwork to be submitted to your Chapter President, Regional Director and/or National Headquarters.</p>

Membership Management Dues

the *red* zone

Task Center Membership Management Membership Intake Compliance Upload Fiduciary Forms Request Help Members Only Sisters Only Logout

Membership Management > Actions >

Manage Dues

Overview Selection Additional Info Validation Receipt

Step: Overview Continue (Selection)

Overview

The manage dues process allows officers to submit dues for chapter members.

Please wait 10 minutes for calculations to complete before printing new transmittals.

Dues

Chapters must remit dues to National Headquarters within 30 days of receipt. The chapter will use the Manage Dues process to record payment of dues from chapter members. **Members selected for dues payment must be financial through your local chapter. If you need to transfer members to your chapter roster, please submit an email to: helpme@deltasigmatheta.org and you will be contacted within 24-48 hours.**

Please select "Continue" to proceed to the next screen.

Step: Overview Continue (Selection)

Manage Approvals

the *red* zone

Task Center Membership Management Membership Intake Compliance Upload Fiduciary Forms Request Help Members Only Sisters Only Logout

Snapshot

Actions > Manage Approvals

Manage Approvals

Overview Approve Additional Information Review Receipt

Step: Overview Continue (Approve)

Overview

Ensure that you have reviewed all required documentation from your chapter officers. Providing there are no concerns after your review and assessment of documentation submitted by the chapter, you will sign (electronic signature) giving your approval of the transactions. Please retain a copy for your records. **Failure to complete this process in a timely manner can result in a delay of the chapter operations.**

Step: Overview Continue (Approve)

Manage Members

the *red* zone

Task Center Membership Management Membership Intake Compliance Upload Fiduciary Forms Request Help Members Only Sisters Only Logout

Membership Management > Actions >

Manage Members i

● Overview
● Selection
● Additional Info
● Validation
● Receipt

Step: Overview Continue (Selection)

Overview

Please read carefully and select "Continue" to proceed to the next screen.

The manage members process allows officers to submit various actions regarding chapter members. Transactions should be processed in batches of similar action (i.e.: 25/50 year honorees, deceased members, and collegiate transition members).

25/50 Year Members
You will need a list of your chapter 25/50 year honorees to request certificates/plaques. You can view a system report of 25/50 year recipients in the reports section of the system. There is no charge for the initial certificate/plaque for a member. There is a charge of \$40 for a replacement certificate/plaque. Please allow up to 8 weeks for processing and delivery of certificate/plaque.

Deceased Members
Chapters should record deceased chapter members in the system as soon as possible. You will need the deceased date to move a chapter member to the Omega Omega chapter. If you perform an Omega Omega for a soror who is not financial at the time of her death, you will need to obtain her member number from national HQ.

Collegiate Transition Members
Collegiate chapters are requested to flag chapter members who have graduated or members who are no longer on their college campus. This process will move the member into a transition chapter until the member affiliates with another chapter.

Please select "Continue" to proceed to the next screen.

Membership Verification

the *red* zone

Task Center Membership Management Membership Intake Compliance Upload Fiduciary Forms Request Help Members Only Sisters Only Logout

Membership Management > Actions >

Member Verification of Financial Status

Member Financial Verification

This process provides financial status of a soror/member.

The membership number and name is required to validate financial status.

The process should be used for validating a member's status for required chapter operations only.

* Membership Number:

* First Name:

* Last Name:

* Required Field

Member Name	Membership Number	Chapter Name	Is Financial
No records to display.			

Various Reports

the *red* zone

The screenshot shows the 'Membership Management' section of the application. A dropdown menu is open under the 'Reports' tab, listing various report options. The main content area is currently empty, displaying 'No records to display.'

Member Name	Chapter Name	Is Financial
No records to display.		

25-50 Year Anniversary

the *red* zone

The screenshot shows the '25/50 Year Anniversary Report' page. It includes a search bar, a 'Refresh' button, and a table header for the report data. The report title '25/50 Year Anniversary' is displayed in large red text.

Printed: 7/1/2017

FIRST NAME	MIDDLE NAME	LAST NAME	PREFERRED NAME	INITIATION DATE	EMAIL	HOME PHONE	CELL PHONE	ADDRESS
50 Year								

Upload Fiduciary Forms

the *red* zone

Task Center Membership Management Membership Intake Compliance **Upload Fiduciary Forms** Request Help Members Only Sisters Only Logout

Upload Fiduciary Forms

Overview Selection Additional Info Validation Receipt

Step: Overview Continue (Selection)

You are about to upload your signed Acknowledgement of Fiduciary Responsibility Form

Please select "Continue" to proceed to the next screen.

Step: Overview Continue (Selection)

Chapter Compliance the *red* zone

Compliance Year 2017

Refresh

Chapter Compliance 2016/2017			
7/1/2017			
All forms and fees have been received for Compliance.			
Number of Financial Members:	243	Special Dispensation:	02-Not Required
National Corp Fee Paid:	Yes	Regional Corp Fee Paid:	Yes
Liability Insurance Paid:	Yes	Bond Insurance Paid:	Yes
CALU			
Forms Received			
Awards:	Yes	International Awareness:	Yes
Foundation:	Yes	Fundraising:	Yes
Program:	Yes	Scholarship Program:	Yes
Economic:	Yes	Chapter Property:	Yes
Education:	Yes	Transition:	Yes
Physical & Mental Health:	Yes	Rules of Order:	Yes
Political Awareness:	Yes	Federal Tax Authorization:	Yes
Compliance GPA S/Q1:	N/A	Annual Audit Report:	Yes
Compliance GPA S/Q2:	N/A	Fiduciary Forms Upload	Yes
Compliance GPA S/Q3:	N/A	Policies & Procedures:	Yes
Compliance GPA S/Q4:	N/A	Advisor Certification:	N/A
Heritage & Archives:	Yes		
Risk Management:	Yes	AROCO Part 2:	Yes

RULES OF ORDER FORM

All chapters shall be governed by Grand Chapter and shall promulgate rules of order and policies and procedures to be submitted to the chapter's Regional Member of the National Scholarship and Standards Committee for review, approval, and compliance and thereafter when amended by two-thirds vote of the chapter members present and voting.

- △ The **Rules of Order Form** is a pdf fill-able form and is available in the **RED** Zone.
(Please only use this form in submitting the chapter's Rules of Order.)
- △ The **Rules of Order Form** now displays all of the officers, positions, and committees that **all** chapters must have to conduct the business of Delta Sigma Theta Sorority, Inc.
- △ The **Rules of Order Form** also allows the chapter to define which member will represent them at major events/activities (i.e. Delta Days, state clusters, etc.).
- △ If the chapter has made changes to their Policies and Procedures the chapter must submit both the Rules of Order Form and Policies and Procedures.
- △ Please review the Rules of Order Form, available in the **Red Zone**
>**Compliance** > **Actions-Forms**.
- △ If the chapter needs additional clarity regarding the Rules of Order Form, please contact the chapter's Regional Member, National Scholarship and Standards Committee.



**Each year the Rules of Order Form
MUST be submitted by June 30th**

Preparation and Process Tips

- △ The Chapter Rules of Order Form is used to provide a snapshot of the chapter structure. The Rules of Order Form includes information regarding:
 - Chapter Structure
 - Meeting Dates
 - Required Percentage for a Quorum
 - Appointed and Elected Positions
 - Amount of Local Chapter Dues
 - Standing, Special and Other Committees
 - Times for Nomination and Election of Officers
 - Selection of Voting and Alternate Delegates, and other Representatives
- △ Utilize the same chapter approval process established as a guide to approve the policies and procedures, to include but not limited to:
 - timeline for submission of recommended changes; and
 - how recommended changes are presented to the executive board and the chapter
- △ Provide timeline for chapter members to submit recommended changes to the policies and procedures committee;
- △ Submit changes to the executive board for review;
- △ Submit changes to the chapter for approval by a two-thirds (2/3) vote of the chapter membership present and voting; prior 30-day notice of vote must be given; and
- △ Submit **unsigned** copies of the latest version of the Rules of Order Form in its original **pdf fillable format** to the Regional Member of the National Scholarship and Standards Committee for review and approval. *(Please do not convert the file to a different format or send hard copies in the US postal mail.)*
- △ Regional Member of the National Scholarship and Standards Committee responds to chapter with revisions, changes or approval within the stated timeline;
- △ Regional Member of the National Scholarship and Standards Committee submits chapter's rules of order form to National Headquarters, **Regional Director** and the **Regional Representative** after approval; and
- △ Rules of Order and/or Policies and Procedures may be implemented **only following** Regional Member of the National Scholarship and Standards Committee approval.

POLICIES AND PROCEDURES

Chapter Policies and Procedures:

- △ Allow chapters to meet requirements;
- △ Allow chapters to work effectively, solve problems, make wise decisions and maintain control;
- △ Provide the rules for the organizational and operational structure of the chapter;
- △ Provide rules for fiscal operation of the chapter;
- △ Describe the leadership and committees, and defines their roles and responsibilities;
- △ Are specific to the needs of the chapter identified by its membership.
- △ Contain the rules by and through which the chapter conducts its business.
- △ Shall not contradict any information in the Grand Chapter *Constitution and Bylaws*.
- △ Shall not contain language that contradicts National policies contained in the Chapter Management Handbook, Doctrine, Protocol and Traditions Manual, Fiscal Officers Manual, Internal Audit Manual, or Delta Internet Guidelines (DIG).
- △ Requires prior 30-day notice and a two-thirds (2/3) vote of the membership present and voting to be amended.
- △ Must be submitted for approval to the Regional Member of the National Scholarship and Standards Committee whenever a change is made. When there are no changes the National Scholarship and Standards Committee Regional Member should be alerted.

NOTES:

- △ The newly adopted amendments may not have to be included in the Chapter's Policies and Procedures. The National Scholarship and Standards Committee will inform all chapters which amendments are germane to the local chapter; and, which amendments may (or must) be included in the local chapter's policies and procedures.
- △ **The National Scholarship and Standards Committee *Hot Off the Press*** is a vehicle for announcing updates and actions taken by the National Scholarship and Standards Committee regarding policies.
- △ Some of the policies announced in ***Hot Off the Press*** may require immediate revisions to the chapter's policies and procedures prior to those policies being published in the appropriate Delta administrative document(s).

Preparation and Process Tips:

- △ Establish a chapter approval process to be used as a guide for the policies and procedures committee, to include but not limited to:
 - timeline for submission of recommended changes; and
 - how recommended changes are presented to the executive board and the chapter
- △ Provide timeline for chapter members to submit recommended changes to the policies and procedures committee;
- △ Submit changes to the executive board for review;
- △ Submit changes to the chapter for approval by a two-thirds (2/3) vote of the chapter membership present and voting; prior 30-day notice of vote must be given; and
- △ Submit **unsigned** copies in **Microsoft Word format** to the Regional Member of the National Scholarship and Standards Committee for review and approval. *(Please do not send hard copies in the US postal mail.)*
- △ Regional Member of the National Scholarship and Standards Committee responds to chapter with revisions, changes or approval within the stated timeline;
- △ Regional Member of the National Scholarship and Standards Committee submits chapter's policies and procedures to National Headquarters, the **Regional Director** and the **Regional Representative** after approval; and
- △ Rules of Order and/or Policies and Procedures may be implemented **only following** Regional Member of the National Scholarship and Standards Committee approval.

Approval Timeline

Submit the chapter policies and procedures and rules of order form to the Regional Member of the National Scholarship and Standards Committee by the June 30th deadline.

The Chapter Policies and Procedures will be returned to the chapter as follows:

Non-Convention Year: Within a 90-day period

Convention Year: Within a 120-day period

If a chapter **must make** corrections/changes, **the chapter has 30 days within which to make the corrections/changes, and then re-submit** the policies and procedures to the Regional Member of the National Scholarship and Standards Committee.

Sample Preparation Timetable

July – August

- △ Policies and Procedures Chair appointed by President.
- △ Chapter members volunteer for/appointed to Policies and Procedures Committee.

September – November

- △ Policies and Procedures Committee convenes to review current Rules of Order Form, Policies and Procedures, Chapter Minutes, and any policy changes from Grand Chapter.
- △ Policies and Procedures Committee educates chapter members on Policies and Procedures and Rules of Order content and timeline.
- △ Policies and Procedures Committee invites chapter members to submit proposed changes and indicates timeline

November – January

- △ Policies and Procedures Committee meets to review and prepare all proposed amendments

February

- △ Policies and Procedures Committee reviews and discusses proposed amendments at Executive Board meeting

March

- △ Policies and Procedures Committee reviews and discusses proposed amendments at chapter meeting

April – May

- △ Policies and Procedures Committee follows the process for review and Chapter approval as described in the Policies and Procedures.
- △ Chapter is given 30-day prior notice for review, and then approves by a two-thirds (2/3) vote at the chapter meeting.

June

- △ President and/or Policies and Procedures Committee submits the Rules of Order Form annually by June 30th
- △ President and/or Policies and Procedures Committee submits Policies and Procedures, if changed, by June 30th

The Rules of Order Form and the Policies and Procedures are submitted to the Regional Member of the National Scholarship and Standards Committee by the June 30th deadline.

SPECIAL NOTICE

The Regional Member of the National Scholarship and Standards Committee encourages conference calls, when needed, with the chapter president and/or chair of the policies and procedures committee to review and discuss the Policies and Procedures and/or Rules of Order Form prior to sending the Approval Form.

ATTENDANCE AT NATIONAL CONVENTION/REGIONAL CONFERENCE

The national convention and regional conferences provide members with an excellent opportunity to:

- △ Learn the business of Delta Sigma Theta Sorority, Inc. as well as
- △ Meet and network with members from other chapters.

It is only in national convention and regional conference that Grand Chapter assembles.

- △ The Grand Chapter assembles in national convention at regular intervals.
- △ The regional conferences are held in alternate years of the national convention.
- △ Each chapter must be represented by one official voting delegate at the national convention and the regional conference.

In Delta Sigma Theta Sorority, Incorporated, voting at the national convention and regional conference shall be on the basis of one vote for each chapter seated.

REQUESTS FOR EXCUSED ABSENCE FROM NATIONAL CONVENTION AND REGIONAL CONFERENCE

Any chapter that will not be represented at a national convention or regional conference must complete a Request Form for Excused Absence from National Convention/Regional Conference.

STEPS CHAPTERS TAKE FOR EXCUSED ABSENCE

- Step 1:** Chapter completes the **Request Form for Excused Absence from National Convention/Regional Conference** in the Members Only Portal, and submits via email to National Headquarters, tvalentine@deltasigmatheta.org
- Step 2:** National Headquarters forwards the form to the Regional Director for her approval or disapproval.
- Step 3:** After the Regional Director's assessment, the request is then forwarded to the National Secretary for final action.

- Step 4:** The National Secretary will notify the chapter president of her decision and will forward a copy to National Headquarters.

SPECIAL DISPENSATION

Chapters with less than the required membership* must request and receive *Special Dispensation* to function in any given sorority year from the Regional Director, who informs the National Scholarship and Standards Committee.

- △ The chapter makes the Special Dispensation request to the Regional Director by submitting a *Chapter Request for Special Dispensation Re: Required Membership*.
- △ This form is available on the **RED** Zone.

*Minimum Membership Requirements for Chapters

- △ Campus-based, Core and City-wide chapters are composed of a minimum of seven (7) members;
- △ Alumnae chapters are composed of a minimum of twelve (12) members

REMEMBER

Your chapter may be small in number however, that does not mean your chapter cannot contribute to the greater good of Delta Sigma Theta Sorority, Incorporated and/or your campus/community.

Make sure your chapter is on one accord and plan programs and events that are feasible for your chapter size and member availability.

OPERATING WITH LESS THAN SEVEN MEMBERS

Chapters under special dispensation must fulfill the designated roles as outlined in the chart below:

# of Chapter Members	Officers in the Collegiate Chapter with Less than Seven Members in a Chapter
1	<ul style="list-style-type: none"> △ President is elected by the chapter. △ Audit chair is a member of the nearby alumnae chapter; and, the nominating chair is the primary advisor or a nearby alumnae chapter member. △ The Regional Director shall designate two fiscal officers of an alumnae chapter to assist in the role of treasurer and financial secretary. The designated alumnae fiscal officers will not have signatory authority on the collegiate chapter's accounts.
2	<ul style="list-style-type: none"> △ President and secretary (<i>recording/corresponding/financial</i>)/treasurer are elected by the chapter. (The secretary/treasurer is one member serving in a dual capacity.) △ Audit chair is a member of the nearby alumnae chapter; and, the nominating chair is the primary advisor or a nearby alumnae chapter member
3	<ul style="list-style-type: none"> △ President, secretary (<i>recording/corresponding/financial</i>) and treasurer are elected by the chapter. △ Audit chair is a member of the nearby alumnae chapter; and, the nominating chair is the primary advisor or nearby alumnae chapter member
4	<ul style="list-style-type: none"> △ President, secretary (<i>recording/corresponding/financial</i>), treasurer, and audit chair are elected by the chapter. The audit chair cannot be the treasurer. △ The nominating chair is the primary advisor or a nearby alumnae chapter member
5	<ul style="list-style-type: none"> △ President, secretary (<i>recording/corresponding/financial</i>), treasurer, audit chair, and nominating chair are elected by the chapter.
6	<ul style="list-style-type: none"> △ President, secretary (<i>recording/corresponding</i>), financial secretary, treasurer, audit chair, and nominating chair are elected by the chapter. △ The elections chair should be appointed by the chapter president only at the time of the elections.
7	<ul style="list-style-type: none"> △ President, secretary (<i>recording/corresponding, which is one person</i>), treasurer, financial secretary, audit chair, and nominating chair are elected by the chapter. △ The elections chair should be appointed by the chapter president only at the time of the elections.

COLLEGIATE CHAPTER WITH ONE MEMBER

- △ The Regional Director shall designate two fiscal officers of an alumnae chapter to assist in the role of financial secretary and treasurer for the collection of funds.
- △ All funds will be deposited in the collegiate chapter's account by the collegiate chapter president.
- △ All disbursements will be supported by vouchers approved by the alumnae chapter member designated as treasurer and the collegiate chapter president.
- △ All checks will be signed by the collegiate chapter president **only**.

RECORD RETENTION AND DESTRUCTION POLICY

This policy is intended to provide guidance regarding the retention and destruction of records. This policy covers records incurred in the daily transaction of business, the documenting of events and history and all other records not governed by other Delta doctrine, such as membership intake related documents.

Record Retention

- △ Records should always be stored in a secure location in cabinets, containers or other air tight storage spaces that will preserve the quality of the records.
- △ Records containing confidential information, such as member records, financial data, and credit card information should be kept under lock and key or in a restricted area with limited access.
- △ Paper records should be scanned and converted to electronic records, whenever possible. Electronic records require less storage space and are readily accessible.
- △ Electronic records should be backed up to external drives (unless otherwise specified) to ensure a minimal loss of data in the event of hard drive failure, theft or other loss of the original data.
- △ The recommended back-up timing is provided in the Record/Destruction Schedule found on the next page.
- △ The retention timeframe will depend on the record type. The timeframes will be re-evaluated yearly to determine if adjustments need to be made based on the format and need for each record type.

- △ The table below provides guidance on the retention timeframe, storage medium and destruction method. **RECORDS DESIGNATED AS PERMANENT SHOULD NOT BE DESTROYED.**

RECORDS MANAGEMENT MATRIX

Type of Records (Paper/Electronic)	Retention Timeframe	Medium	Convert to Electronic Record	Back-up of Electronic Records	Destruction Method
Financial Records (receipt logs, 990's, receipt books, check registers)					
*Bank Reconciliations	5 Years	Paper/ Electronic	Monthly	Weekly	Shred/Eraser
*Bank Statements	5 Years	Paper/ Electronic	Monthly	Weekly	Shred/Eraser
*Checks	5 Years	Paper	Monthly	Weekly	Shred
*Check Registers	5 Years	Paper	Monthly	Weekly	Shred
*Expense Purchases	5 Years	Paper	Monthly	Weekly	Shred
*Form 990	5 Years	Paper/ Electronic	Monthly	Weekly	Shred/Eraser
*IAR-1 Form	5 Years	Electronic	Quarterly	Quarterly	Eraser
*Receipt Logs	5 Years	Paper/ Electronic	Monthly	Weekly	Shred/Eraser
*Receipt Books	5 Years	Paper	When Book is Completed	Monthly	Shred
*Vouchers	5 Years	Paper/ Electronic	Monthly	Weekly	Shred/Eraser
*Year-end Financial Statements	7 Years	Paper/ Electronic	End of the Year	Yearly	Shred/Eraser
Audit Reports	7 Years	Paper/ Electronic	Quarterly	Quarterly	Shred/Eraser
Audit Work Papers	7 Years	Paper/ Electronic	Quarterly	Quarterly	Shred/Eraser
Meeting minutes	Permanent	Paper/ Electronic	Monthly	Weekly	N/A
Member records	5 Years	Paper/ Electronic	Monthly	Weekly	Shred/Eraser
Contracts and legal documents	4 Years after expiration	Paper/ Electronic	Upon Receipt	Weekly	Shred/Eraser

***NOTE:** Records should not be destroyed when the Sorority is in litigation.

Type of Records (Paper/Electronic)	Retention Timeframe	Medium	Convert to Electronic Record	Back-up of Electronic Records	Destruction Method
Membership Intake Documents:					
Chapter Copies of documents	6 Months after Initiation	Paper	N/A	N/A	Shred
Training/Guidance Material	4 Years	Paper/ Electronic	Monthly	Quarterly	Shred/Erase
Original Application for Membership	4 Years, If Accepted	Paper	Monthly	Quarterly	Shred/Erase
Original Application for Membership	2 Years, If Rejected	Paper	Monthly	Quarterly	Shred/Erase
Correspondence	4 Years	Paper/ Electronic	Quarterly	Quarterly	Shred/Erase
Complaints	2 Years	Paper/ Electronic	Quarterly	Quarterly	Shred/Erase
Court Orders and Settlements	Permanent	Paper/ Electronic	Monthly	Monthly	N/A
Other					
Scholarship Information	5 Years	Paper	Yearly	Yearly	Shred
Chapter Rules of Order	Until Newly Revised and Approved	Paper/ Electronic	When Approved by Scholarship and Standards	Yearly	Shred/Erase
Chapter Policies and Procedures	Until Newly Revised and Approved	Paper/ Electronic	When Approved by Scholarship and Standards	Yearly	Shred/Erase
Chapter Records	Permanent	Electronic	Upon Approval	Yearly	N/A
Correspondence (actionable)	3 Years	Paper	Monthly	Monthly	Shred/Erase
Correspondence (informational)	3 Years	Paper	N/A	N/A	Shred
Chapter Histories	Permanent	Paper	N/A	Monthly	N/A
Event Programs	5 Years	Paper	After Each Event	Monthly	Shred
Photographs	Permanent	Paper/ Electronic	After Each Event	Monthly	N/A

***NOTE:** Records should not be destroyed when the Sorority is in litigation.

YEARLY PLANNING CALENDAR

Following the chapter's planning session and review of proposed activities, an annual chapter calendar of activities for the upcoming fiscal year should be developed. A sample calendar follows:

June/July/August

- △ Attend regional conference or national convention, if applicable
- △ Submit Annual Financial Report and Federal Income Tax Group Return Authorization (August 31)
- △ Submit Audit Report (August 31)
- △ Chapters with less than the required number of members submit the Special Dispensation Form (Collegiate <7 or Alumnae <12) by June 30th or as it becomes necessary

September

- △ Begin review of Grand Chapter *Constitution and Bylaws* changes
- △ Begin review of Chapter *Rules of Order Form*
- △ Begin review of Chapter's Policies and Procedures
- △ Approve/update program planning for year
- △ General organization of chapter/first chapter meeting of the year
- △ Inventory and order all supplies
- △ Review and Prepare for Membership Intake Process (if intake is scheduled, include Delta Internal Development (DID) workshops to be submitted and approved by the Regional Director)
- △ Begin Delta public service programs
- △ Collegiate chapters submit Annual Review Acknowledgement Form
- △ Collegiate Chapters submit GPA Compliance Report Form
 - *The GPA Compliance Report Form is due at the end of each quarter/semester including summer term*

October

- △ Implement on-going activities; continue Delta public service programs
- △ Implement Project 13 programs/activities/initiatives
- △ Continue Social Action voter registration/mobilization activities

November

- △ Continue Delta public service programs and Project 13 programs/activities/initiatives
- △ Implement fundraising activities and chapter public service programs
- △ Plan and/or implement sisterhood activities
- △ Implement Social Action voter mobilization and get-out-the vote activities

December

- △ Continue Delta public service programs and Project 13 programs/activities/initiatives
- △ Implement Grand Chapter's World AIDS Day programs and activities
- △ Plan for Delta Days in the Nation's Capital

January

- △ Founders Day Activities*
- △ Begin collection of dues (payable January 1 thru March 31)
- △ Conduct mid-year review of chapter programs
- △ Collegiate Chapters submit GPA Compliance Report Form
(The GPA Compliance Report Form is due at end of each quarter/semester)
- △ Remit membership dues and fees to National Headquarters within required timeframe

February

- △ Continue Delta public service programs and Project 13 programs/activities/initiatives
- △ Plan for regional conference or national convention representation
- △ Review corporate forms and begin preparation for submission (Collegiate only)
- △ Complete mid-year review of chapter programs
- △ Plan National Sisterhood Month activities
- △ Remit membership dues and fees to National Headquarters within required timeframe

March

- △ Remit dues and fees to National Headquarters, including National and Regional Corporate Fees, Annual Chapter Liability Insurance, and Annual Chapter Bonding Insurance (Deadline – March 31)
- △ Continue Delta public service programs and Project 13 programs/activities/initiatives
- △ Implement National Sisterhood Month Activities

April

- △ Evaluate chapter programs (Collegiate only)
- △ Begin program planning for the next year
- △ Elect and install officers (Collegiate Only)
- △ Submit Annual Report of Chapter Officers Form (Red Zone — Due June 30)
- △ Submit Advisors Certification Form (Due June 30 – Collegiate Only)
- △ Submit Chapter Demographics Reporting Form (Red Zone — June 30)
- △ Conduct Transition of Officers Meeting (Collegiate Only)
- △ Receive end-of-year reports from all committee chairs (Collegiate Only)
- △ Vote on chapter programs for next year (Collegiate Only)
- △ Vote on budget for next year (Collegiate Only)
- △ Select delegate(s) to national convention or regional conference

May

- △ Implement May Week Activities (if chapter has May Week)
- △ Elect Officers
- △ Submit Annual Report of Chapter Officers Form (Red Zone — Due June 30)
- △ Submit Chapter Demographics Reporting Form (Red Zone — June 30)
- △ Receive end-of-year reports from all committee chairs (Alumnae)
- △ Vote on chapter programs for next year (Alumnae)
- △ Vote on budget for next year (Alumnae)
- △ Attend regional conference, if applicable

June

- △ Install Officers (Alumnae)
- △ Conduct Transition of Officers Meeting (Alumnae)
- △ Attend regional conference, if applicable

July

- △ Attend the regional conference or national convention (The national convention is held in alternate years of the regional conference.), if applicable
- △ Continue transition of officers

***NOTE:** Founders Day Activities may extend from January 1st thru March 31st.

CHAPTER REACTIVATION

Members associated with the chapter to be reactivated should communicate with the Regional Director indicating their desire to reestablish the chapter, and provide supporting reason(s) for the request.

Chapter reactivation is facilitated by the Regional Director utilizing members within the region and/or members of the Regional Leadership Team. The Regional Director shall make an assessment to determine the viability of reactivation by taking the following steps:

Collegiate Chapters

- △ Assessment of chapter status
 - University
 - Historical facts to be considered
- △ Interview with past primary advisor, if available
- △ Background information for inactivity
 - Reason for being inactive, sanctioned or retired
- △ Evidence of interest from student body
 - Conduct Informational Session on campus
 - Record number of attendees, classification status, GPA
- △ Review of statistical data from University
- △ Sustainability Review
 - Demographics of campus; undergraduate female student population
 - Breakdown of ethnic categories (African American, White, Other)
 - Enrollment projections for prior two years and next three years
 - Average GPA of all female students
 - Average GPA of female students by ethnic category
- △ Greek Life /Student Affairs Requirements and procedures
 - Identify university contact
 - Registered Student Organization criteria and policies
 - Student membership requirements
 - Chapter requirements, specific deadlines that could impact reactivation
- △ Review of surrounding support
 - Alumnae Chapter
 - Advisory Council, trained advisors in area

Alumnae Chapters

- △ Assessment of chapter status
 - Historical facts to be considered
- △ Background information for inactivity
 - Reason for being inactive, sanctioned or retired

- △ Evidence of interest from the community
 - Conduct Informational Session (depending on the size and location of the alumnae chapter)
- △ Review of statistical data regarding the service area
- △ Review of surrounding support from and impact on other alumnae chapters

Once the assessment is complete, the Regional Director shall move forward with the recommendation to reactivate the chapter or place information in the chapter file that states why reactivation is not recommended at this time.

If a Collegiate Chapter is being reactivated and there are not any current members...

The Regional Director shall designate an alumnae chapter to assist with the collection of funds during the reactivation, and/or Membership Intake Process.

- △ All funds received will be collected and disbursed by the fiscal officers of the alumnae chapter.
- △ Funds collected by the alumnae chapter must be reconciled and disbursed to the collegiate chapter when:
 - Reactivation, and/or Membership Intake Process are completed.
 - Elections of collegiate chapter officers has occurred.
 - Bank accounts have been established.

SECTION III

CHAPTER MANAGEMENT: RESOURCE TOOLS

FISCAL OFFICERS MANUAL

[\(Members Only Portal – National Committees – Finance Committee\)](#)

The leadership team of the local chapter of Delta Sigma Theta Sorority, Inc. has, as part of its composition, the fiscal officers elected by the chapter or appointed by the chapter president. The fiscal officers have a fiduciary responsibility, meaning a legal or ethical relationship of confidence and trust specific to each position. The fiscal officers consist of the chapter president, treasurer, financial secretary and any assistants to the treasurer or financial secretary.

The information set forth in this document provides policies and procedures for the fiscal operations of local chapters. It should be used to assist chapters in developing and reviewing local fiscal policy that ensures appropriate internal controls are in place to safeguard and account for the chapter's assets.

Although chapters may set local fiscal policy, policies set by the local chapter must not be in conflict with this manual, the *Constitution and Bylaws*, Chapter Management Handbook and other governing documents of Grand Chapter.

Excerpt from the Introduction to the Fiscal Officers Manual, November 2016

DELTA INTERNET GUIDELINES

[\(Members Only Portal – National Committees – Technology Committee\)](#)

The Internet provides an excellent opportunity to inform both sorors, and the public, of Delta activities throughout the world. This document outlines Delta's guidelines pertaining to various aspects of the Internet to include websites, email, social media, and the use of merchant accounts. This document has been prepared in the interest of:

- △ Protecting Delta Sigma Theta Sorority, Inc. and minimizing potential legal liability.
- △ Providing a framework for regions, chapters, and individual sorors to communicate via the internet.
- △ Assisting the organization in efficient and effective operation.

Delta has intellectual property interests in its symbols, ceremonies, and other materials which need protection from legal risks. Therefore, accurate, complete and current information is critical to legal protection. The Delta Internet Guidelines (DIG) is maintained by the National Technology Committee and has been approved by the Scholarship and Standards Committee, which is responsible for enforcing the policies and procedures of the Sorority.

Excerpt from the Introduction to the Delta Internet Guidelines, Updated 1/27/2015

RISK MANAGEMENT MANUAL

[\(Members Only Portal – National Committees – Program Planning & Development Committee\)](#)

Delta Sigma Theta Sorority, Incorporated (“DST”) currently sponsors several programs designed to promote the development of young girls and boys. These include, but are not limited to, Delta GEMS (“GEMS”), Delta Academy (“Academy”), and EMBODI (collectively “youth initiatives”).

The youth initiatives are supervised by Delta’s National Program Planning and Development Committee, but implemented through alumnae chapters, sometimes with the participation of collegiate chapters.

Generally, each chapter administers the youth initiatives through committees, which are responsible for oversight of these programs.

To ensure that all participating chapters (alumnae and collegiate) administer all youth initiatives consistently and in a manner that is in the interests of both the participating youth and Delta (i.e., minimize any harm or injury to the youth as well as the probability of Delta incurring liability), each sponsoring chapter shall adhere to the policies set forth in the Risk Management Manual.

Excerpt from the Overview in the Risk Management Manual, September 2017

INTERNAL AUDIT MANUAL

[\(Members Only Portal – National Committees – Internal Audit Committee\)](#)

The information set forth in this document provides policies and procedures for the audit of local chapters of Delta Sigma Theta Sorority, Incorporated. It should be used to assist chapters in conducting audits to ensure appropriate internal controls are in place to safeguard and account for the chapter’s assets.

Although chapters may set local audit policies, they must not be in conflict with the *Constitution and Bylaws*, Chapter Management Handbook, the National Internal Audit Manual, the National Fiscal Officers Manual or any other governing documents of Grand Chapter.

Excerpt from the Overview in the Internal Audit Manual, September 2016

KEY AUDIT REPORTING DATES

(as of 10/2016)

ANNUAL SUBMISSIONS

Due Date

Annual Internal Audit Report (IAR-1)	August 31 st
External Review/Audit of Financial Statement	August 31 st
Annual Financial Report – Collegiate	August 31 st
Annual Financial Report – Alumnae	August 31 st
Acceptance of Responsibility Forms	August 31 st

QUARTERLY SUBMISSIONS

Due Date

Quarter 1 (July through September)	December 1 st
Quarter 2 (October through December)	March 1 st
Quarter 3 (January through March)	June 1 st
Quarter 4 (April through June)	August 1 st

All reports MUST be filed in the Red Zone.

The schedule below is a recommendation which can be used for planning chapter audits. The only mandatory dates are the **Red Zone** filing deadlines.

Transaction Period	Chapter Audit Committee Begins Audit	Report to Chapter by	<u>Must File in the RED Zone by</u>
Q1 July 1 – September 30	2 nd week in October	2 nd week in November	December 1
Q2 October 1 – December 31	2 nd week in January	2 nd week in February	March 1
Q3 January 1 – March 31	2 nd week in April	2 nd week in May	June 1
Q4 April 1 – June 30	2 nd week in July	Sept. Chapter Meeting	August 1
Annual IAR-1	n/a	Sept. Chapter Meeting	August 31
External Audit/External Review	n/a	Sept. Chapter Meeting	August 31

SECTION IV

CHAPTER OFFICERS AND MEMBERS: ROLES AND RESPONSIBILITIES

PRESIDENT

The president of a chapter of Delta Sigma Theta Sorority, Inc. is more than a presiding officer. She is the leader of the chapter.

To maximize chapter effectiveness and member engagement, a leader in Delta Sigma Theta Sorority, Inc. must focus not only on carrying out the business of the chapter, but also on providing an environment which fosters sisterhood. The general duties of the office of president focus primarily on managing and conducting the business components of the chapter. In fact, successful chapter operations depend upon the effective and efficient fulfillment of these responsibilities. It is analogous to addressing the task and orientation aspects of the office.

The president will engage and encourage more members by:

- △ Being respectful of time; starting and ending meetings on time,
- △ Valuing relationships with other officers and members,
- △ Demonstrating a genuine care for the well-being of members,
- △ Providing positive feedback and praise,
- △ Being transparent regarding the chapter's plans and activities, and
- △ Creating an atmosphere of honesty and trust.

As the leader of the chapter, she is responsible for the efficient fiduciary and managerial functioning of the chapter. Along with the other fiscal officers, the chapter president must be covered by general bonding insurance.

In addition to her responsibilities for presiding at chapter meetings and for leading ritualistic services, the chapter president is responsible for calling special meetings and for communicating with national and regional officers, and National Headquarters staff. She is responsible for the appointment of standing and special committees, and for coordinating the activities of the chapter. The chapter president speaks for the chapter and she serves as an ex-officio member of all committees, except the nominating and internal audit committees. Additionally, she is responsible for sharing printed and electronic materials received from national and regional officers, and National Headquarters, and all other correspondence with members of the chapter.

When selecting the chapter's leadership team, it is important for the chapter president to use the best member for the position based on the member's skills and talents, going beyond personal friends and those friendly to the administration. A diversity of ideas, ages, years in Delta, and relationships will assist the chapter president in the generation of ideas that represent the make-up of the chapter.

As a leader, the chapter president also plays a key role in motivating chapter members to engage in the chapter's meetings and other activities. It is important to project a positive attitude regarding the chapter's initiatives and the abilities that each member brings to the group.

In order to motivate chapter members, the president should present clear goals, maintain open communications, provide positive feedback to officers and members, and celebrate success. Chapter members should feel a part of the whole. Therefore, chapter presidents should not just engage their own supporters and those who are considered "yes" members; rather, chapter presidents should value the opinions of opponents, as well as encouragers. Chapter presidents should **listen** with understanding and without judgment - more than she speaks, as the chapter members share their ideas and concerns and raise questions. Chapter presidents' goals are not always to answer or defend. It may be to hear, observe, and then to seek the best resolution.

As the leader, the chapter president also must be willing to admit mistakes, apologize, and then move forward. The chapter president's goal is to empower the members, so that they buy into the national vision and then accept it as their vision for the chapter. Delta Sigma Theta Sorority, Inc. is both a business which is the reason for the word "Incorporated" and it is a sisterhood, which is the reason for the word sorority in our name. We cannot take either for granted if we plan to survive, thrive, and move forward during the next 100 years.

There must be open and consistent communication between the chapter president, the other chapter officers and committee chairs, and the chapter members. In addition, the chapter president must maintain open and consistent communication with the regional leadership.

As the presiding officer for the chapter, the chapter president is responsible for:

- △ *Overseeing* the execution of the Sorority's Five-Point Programmatic Thrust within the chapter.
- △ *Maintaining* the efficient fiduciary and managerial functioning of the chapter.
- △ *Communicating* with the Regional Director any issues or concerns that may arise within the chapter.
- △ *Implementing* Delta Sigma Theta Sorority, Inc.'s programs, policies, procedures, and the *Constitution and Bylaws* within the chapter.
- △ *Managing* the chapter in a manner that is a positive reflection on Delta Sigma Theta Sorority, Inc.; and, is a positive example for her leadership team, and the chapter members whom she serves.
- △ *Ensuring* that the chapter business of Delta Sigma Theta Sorority, Inc. is taken care of effectively and efficiently.

The chapter president must be dependable, mature and able to work under a moderate degree of pressure.

The chapter president's personal and professional life must be able to withstand added demands upon her time.

The chapter president must be financial throughout her tenure in office.

The chapter president's general responsibilities include, but are not limited to:

△ Presiding at all Chapter Meetings (Regular, Special and Called)

- Setting the tone of the meeting;
- Calling the meeting to order;
- Conducting the ritualistic opening and closing;
- Presenting the agenda (which she has prepared with the executive committee);
- Determining the order throughout the meeting; and
- Declaring when the meeting is to be adjourned.

△ Demonstrating a Knowledge of Parliamentary Procedure

- Taking all motions;
- Keeping all discussion pertinent to the motion, and answering questions pertaining to the motion;
- Putting the motion to a vote; and, announcing the results;
- Understanding that the goal is to best execute the wishes of the chapter in the most efficient manner;
- Using parliamentary procedures to set a time limit for discussion; and
- Knowing whether a situation demands a vote or when common consent has been achieved.

△ Working with Chapter Officers and Committees

- Serving as chair of the executive board and preparing the agenda;
- Working closely with the executive board (all elected and appointed officers and chairs of standing and appointed committees);
- Helping the executive board to understand the need for definite and complete presentations;
- Assisting other officers in the execution of their duties; and
- Reviewing and approving all chapter communication, publications and matters of finance.

- △ **Ensuring Adherence to Fiscal Policies**
 - The chapter president must adhere to the fiscal policies outlined in the Fiscal Officers Manual

- △ **Appointing all Committee Chairs and Committee Members (unless otherwise provided for in the chapter's Rules of Order Form and Policies and Procedures)**
 - Taking into consideration the job to be done, available resources, and knowing the abilities, potentialities and interests of each member;
 - Helping committee chairs and the committee members to understand what is expected of them; and
 - Helping to define the committee's focus relative to the framework of the chapter's total program.

- △ **Fulfilling Responsibilities to Grand Chapter.**
 - Assuring that corporate accountability reports are completed and submitted; and
 - Assuring that chapter compliance is met by established deadlines.

CHAPTER PRESIDENT'S ROLES and RESPONSIBILITIES OUTLINED for CHAPTER POLICIES and PROCEDURES

The chapter president shall:

- △ Preside at all meetings
- △ Lead all ritualistic services
- △ Coordinate, manage and oversee the operations and activities of the chapter
- △ Communicate with Grand Chapter and National Headquarters
- △ Distribute and interpret materials from Grand Chapter and National Headquarters
- △ Appoint all committee chairpersons (except nominating and internal audit)
- △ Enforce observance of Grand Chapter *Constitution and Bylaws*, Chapter Rules of Order and Policies and Procedures
- △ Call special meetings
- △ Serve as chair of the executive board and prepare executive board agenda
- △ Serve as an ex-officio member of all committees excluding the Nominating Committee and Internal Audit Committee
- △ Sign all binding documents and/or contracts
- △ Be responsible for the management and collection of revenue
- △ Approve the expenditure of funds (ensures that all checks have two signatures)
- △ Be accountable to the chapter for the expenditure of funds
- △ Initial all deposits that contain cash
- △ Ensure a voucher system is used for the disbursement of funds
- △ Ensure fiscal officers attend financial workshops at least once a year

- △ Ensure all fiscal officers are bonded
- △ Attend finance workshops
- △ Sign all checks except her own
- △ Under NO circumstances pre-sign checks
- △ Ensure that internal/external audits are completed
- △ Ensure the outgoing and incoming fiscal officers' conduct an effective transition
- △ Ensure treasurer and financial secretary provide separate written reports to safeguard that proper segregation of the financial roles is maintained.
- △ Ensure the Annual Financial Report/Federal Group Authorization Return is completed
- △ Complete the Acceptance of Fiduciary Responsibility Form
- △ Read and be familiar with the Fiscal Officers Manual and Chapter's Financial Policies and Procedures
- △ Review all bank statements and fiscal officers reports monthly
- △ Recommend to the executive board the removal of any elected or appointed officer who fails to perform her duties
- △ Be the spokesperson for the chapter
- △ Authorize, by her signature, all orders and proceedings of the chapter
- △ Be responsible for taking all action required by Grand Chapter and filing all reports required by Grand Chapter
- △ Perform all other duties as provided by the current edition of *Robert's Rules of Order, Newly Revised*
- △ Be responsible for transferring complete records and documentation to the incoming president
- △ Ensure the Annual Financial Report and Federal Income Tax Group Return Authorization form is completed and submitted by August 31
- △ Ensure that the chapter meets all financial reporting deadlines
- △ Ensure that a monthly report of the chapter's finances is presented to the chapter
- △ Ensure that the chapter operates under an approved budget
- △ Be responsible for timely collection of chapter mail and distribute as appropriate

VICE PRESIDENT(S)

The chapter vice president(s) shall:

Possess the same leadership skills as the president; and

- △ Serve in the place of the president in her absence or at her request.

The vice president(s) has responsibility for membership, including reclamation and/or program activities (If outlined in the chapter's policies and procedures).

The vice president(s) may work directly with the Membership Services Committee. In some chapters, she also has responsibility for program planning and development activities.

Large chapters may have more than one vice president. For instance, large chapters may have a vice president for Membership and a vice president for Program, Planning and Development.

Under no circumstances should a chapter have a vice president for Finance because that is the role of the chapter treasurer.

When the vice president has the responsibility for membership, she may serve as the chair of the membership committee. As chair of the membership services committee, the vice president has the responsibility to ensure appropriate activities/strategies are planned and executed to address:

- △ *Retention* of chapter members;
- △ *Reclamation* of sorors who become inactive and ineligible to participate in sorority activities; and,
- △ *Transition* of collegiate chapter members to the alumnae chapter.

Supporting, educating and developing the chapter membership, and reaching out to inactive sorors, and assisting collegiate sorors with transitioning into the alumnae chapter are critical roles for the vice president. This may solely be her responsibility, or she may have a membership committee.

Likewise, when the vice president is responsible for program, planning and development, she may serve as the chair of the Program Planning and Development Committee. If a vice president is the chair of the chapter Program Planning and Development Committee, it is her responsibility to:

- △ *Ensure* national initiatives are implemented,
- △ *Ensure* steps in the program planning and development process are followed,
- △ *Ensure* recommendations are made based on an evaluation method, and
- △ *Ensure* the chapter demographic reporting form is completed after each activity.

Her role as chair of either of the Membership and/or Program Planning and Development committees should be written in the chapter's policies and procedures as part of the vice president's responsibilities.

The order of succession also should be delineated in the chapter's Policies and Procedures.

- △ In the absence of the president, the vice president assumes the role of the president with the exception of the president's fiduciary responsibilities.
- △ The vice president does not sign checks or vouchers on behalf of the president.
- △ If there is more than one vice president, in the absence of the president, the order of succession is used in determining which vice president serves.
 - For example, the first vice president would preside in the absence of the president; and,
 - If the first vice president and the president are absent, the second vice president

would preside.

- If the president as well as the first vice president and the second vice president are absent, the chapter recording secretary shall call the meeting to order and preside until the immediate election of a chairperson pro tem.

In chapters where the standing and special committees report to the various vice presidents, the finance (or budget and finance), internal audit, and nominating committees shall not report to the vice president.

- △ The finance (or budget and finance) committee reports to the treasurer.
- △ The internal audit and the nominating committees report to the chapter president and the executive board.
- △ The elections committee, which is a special committee, reports to the chapter president and the chapter.
- △ The Minerva Circle reports to the chapter.

NOTE:

- 1. The vice president for membership is not automatically the Leader of the Minerva Circle. The Minerva Circle is a special committee, and the Leader of the Minerva Circle is an elected position.**
- 2. If the chapter's policies and procedures state that the vice president shall serve as the Leader of the Minerva Circle then that vice president has been elected to serve as the Leader of the Minerva Circle and as such assumes those responsibilities.**
- 3. If the chapter's policies and procedures do not state that the vice president serves as the Leader of the Minerva Circle, then she cannot assume any of the responsibilities of the Leader of the Minerva Circle.**

SECRETARIES (RECORDING and CORRESPONDING)

Large chapters with a great deal of business may separate the functions of the secretary into two offices. It is permissible to have a **recording secretary**, who is responsible for taking the minutes; and a **corresponding secretary**, who sends and receives all the official correspondence of the chapter. (Please note the financial secretary is a fiscal officer, and is listed in a separate section.) The chapter should make certain that the activity warrants this separation of functions. In large chapters, these officers may have assistants that are either appointed or elected.

NOTE: When there is a corresponding secretary, the unqualified word secretary used alone refers to the recording officer.

Recording Secretary

The secretary is the recording officer of the chapter and the custodian of its records, except those specifically assigned to others, such as the treasurer's books.

The Secretary is responsible for:

- △ Keeping an accurate record—usually called the minutes—of all proceedings of the chapter (i.e., executive board, chapter, and call meetings);
- △ Providing copies of the minutes to the membership;
- △ Keeping on file all committee reports;
- △ Receiving and maintaining all records of the chapter;
- △ Recording all votes;
- △ Making the minutes and records available to members upon request;
- △ Notifying officers, committee members, and delegates of their election or appointment;
- △ Furnishing committees with whatever documents are required for the performance of their duties, and having on hand at each meeting a list of all existing committees and their members;
- △ Signing all certified copies of acts of the chapter, unless otherwise specified in the chapter's policies and procedures;
- △ Maintaining record book(s) in which the chapter's rules of order form, policies and procedures, and minutes are entered, with any amendments to these documents properly recorded; and, having the current record book(s) on hand at every meeting; and,
- △ In the absence of the President and Vice President, calling the meeting to order and presiding until the immediate election of a chairperson pro tem.

Corresponding Secretary

The corresponding secretary is responsible for all of the chapter's incoming and outgoing correspondence. The corresponding secretary receives mail and sends out mail on behalf of the chapter.

The mail the corresponding secretary receives does not belong to her— she receives it on behalf of the chapter.

The corresponding secretary receives and distributes bank statements to the chapter president for her review and signature.

The corresponding secretary DOES NOT OPEN THE BANK STATEMENT. This is the chapter president's responsibility. The chapter president opens, reviews, and signs the bank statement before distributing it to the chapter treasurer.

- △ **The corresponding secretary never sends out mail unless the chapter president has authorized it.**
 - All chapter correspondence is generally sent out over the signature of the chapter president.
 - Correspondence may also be sent out over the corresponding secretary's signature after the chapter president has authorized, reviewed, and approved it.

- △ The corresponding secretary receives the correspondence of the chapter.

It is highly recommended that each chapter rent a local post office box in which to receive mail. The corresponding secretary should pick up the mail from the post office box; however, under certain circumstances a designated chapter member may check the post office box and then give the mail to her.

- △ The corresponding secretary is responsible for reading all incoming correspondence at the executive board and chapter meetings.
- △ The corresponding secretary files official correspondence in a permanent place (e.g., file storage box or cabinet in a room in a storage facility) and, when a question is raised, she is in a position to find the item under discussion and present it to the chapter, committee, or individual(s) raising the question.
- △ The corresponding secretary should keep a copy of all outgoing correspondence.

If correspondence received from National Headquarters or the Regional Director is not read during the chapter meeting, then a summary statement must be prepared that:

- △ Acknowledges receipt of the correspondence;
- △ Provides a brief summary of the content; and
- △ Clarifies the disposition of each piece of correspondence.

This will help to ensure that chapter members are kept fully apprised of Grand Chapter directives and activities. This summary statement becomes a part of the corresponding secretary's report and should be provided in written form to the chapter and the recording secretary for inclusion in the official minutes.

Remember, correspondence is frequently the first impression your chapter makes on others... be sure that you make the best possible impression.

In summary, it shall be the duty of the corresponding secretary to:

- △ Notify members of the date, time, and location of all meetings;
- △ Set up and regularly check the chapter's post office box;
- △ Collect and make available all incoming correspondence to the executive board (at the executive board meeting) and the chapter (at the chapter meeting);
- △ Collect bank statements and forward the bank statement **UNOPENED** to the chapter president for review;
- △ Upon approval of the chapter president, write and send all chapter correspondence;
- △ Maintain files of all incoming and outgoing correspondence;
- △ Set up and maintain the chapter's voice mail message system;
- △ Prepare and distribute the chapter newsletter and other mailings;
- △ Manage the chapter's website and e-mail list in accordance with Delta's Internet Guidelines (unless this duty has been designated to the Technology Committee); and
- △ Ensure that the chapter directory is held strictly confidential and not used by external persons or by chapter members for "junk mail" solicitations.

TREASURER AND FINANCIAL SECRETARY

Treasurer

The treasurer must adhere to the fiscal policies outlined in the Fiscal Officers Manual.

Financial Secretary

The financial secretary must adhere to the fiscal policies outlined in the Fiscal Officers Manual.

Assistant Financial Secretary/Assistant Treasurer

If the chapter is large enough to support these positions, the assistant financial secretary and the assistant treasurer must adhere to the fiscal policies outlined in the Fiscal Officers Manual.

ELECTED POSITIONS

(Nominating Committee, Chair and Members, Internal Audit Chair and Minerva Circle)

Elected Positions (Chairs and Committee Members)

- △ The **Nominating Committee** Chair and members are **elected**.
 - The Nominating Committee Chair is elected as a position by the chapter.
 - The only exception is in chapters that are on Special Dispensation.
- △ The **Internal Audit Committee** Chair is **elected**.
 - However, the Audit Committee members are appointed by the chapter president unless otherwise designated in the chapter's policies and procedures and rules of order form.
- △ The elected nominating committee chair and elected audit committee chair should attend the executive board meetings just as the appointed committee chairs attend.
 - They also should report to the executive board in accordance with their roles and responsibilities as outlined in the chapter's policies and procedures.
 - The executive board hears these reports; however, it does not take any action on these reports.

NOTE: The Nominating Committee Chair and members, and the Audit Committee Chair are NOT OFFICERS of the chapter; they are elected committee chairs or elected members of a committee and therefore are listed as holding elected positions on the Rules of Order Form and in the chapter's Policies and Procedures.

- △ The **Minerva Circle** also is considered as elected positions.
 - The chapter president and financial secretary serve by virtue of their positions.
 - The Leader of the Minerva Circle may or may not be a chapter vice president, and therefore she may be elected at the time the Minerva Circle is elected, if she is not the chapter vice president.
 - The Nine Jewels are elected as a group; and, the Keeper of the Muses and Graces, and the Convener of the Odyssey Experience are elected by position.
 - The duties and responsibilities of the Minerva Circle are outlined in the Administrative Procedures for Membership Intake.

Requirements for Appointment of Chapter Officers and Positions

It is important to note that the chapter president can only appoint chapter members to elected offices and positions when:

- △ the office or position is vacant due to a member not being elected during the chapter elections; or
- △ as a result of an unexpected vacancy.

In both scenarios, the office or position would be filled according to the chapter's policies and procedures for filling vacancies. Only chapter members who meet the eligibility requirements for elected offices or positions as described in the chapter's policies and procedures can be appointed to fill the vacancies.

In the event the chapter president cannot fill the vacant office or position due to chapter member(s) not meeting the eligibility requirements, or no member is willing to serve, she shall contact the Regional Director and request approval for special dispensation to make an appointment.

Note: Members are encouraged to attend regional conferences and national conventions in order to prepare to serve in key chapter positions.

OTHER POSITIONS (ELECTED OR APPOINTED)

Historian

- △ The chapter historian may be an **elected or appointed** position as specified in the chapter's policies and procedures. She is responsible for compiling an annual written narrative account of the chapter's activities and submitting it to the chapter president and the membership for approval before publication. This record becomes a permanent part of the chapter's history.

Journalist

- △ The chapter journalist may be an **elected or appointed** position as specified in the chapter's policies and procedures. She is responsible for compiling news and information for publication.

Sergeant-at-Arms

- △ The sergeant-at-arms is an **elected or appointed** position, as specified in the chapter's policies and procedures and rules of order form.

- △ The sergeant-at-arms:
 - Fulfills the role as outlined in the *Ritual*;
 - Assists the chapter president in keeping order at all times;
 - Supervises the admittance of all persons to chapter meetings;
 - Keeps a record of all members and visiting sorors present at meetings; and
 - Submits the attendance report to the recording secretary for the roll call and the determination of a quorum.
- △ The financial secretary provides the sergeant-at-arms with a list of financial chapter members prior to the beginning of each meeting.

Custodian of Properties

The custodian of properties may be an **elected or appointed** position, as specified in the chapter's policies and procedures and rules of order form.

- △ The custodian:
 - Maintains a safe and central repository for the chapter's properties (e.g. the official documents, candles, robes, tablecloths, gavel, and other effects which the chapter may obtain for the orderly and proper conduct of ceremonies and business);
 - Keeps a written inventory of all chapter properties; and
 - Submits an annual inventory report to the chapter president with a copy to the recording secretary.

Chaplain

- △ The chaplain is an **appointed** position only. This must be specified in the chapter's policies and procedures and rules of order form.
- △ The chaplain
 - Fulfills the role as outlined in the *Ritual* and sets the spiritual tone of the meetings when so requested.
 - Keeps an accurate record of deceased members and their obituaries and submits the same to the chapter president. The chapter president then reports the information to the National Headquarters staff on or before the designated date prior to national convention or regional conference.

Parliamentarian

- △ The parliamentarian is a chapter position **appointed** by and responsible to the chapter president. The parliamentarian is not elected.
- △ Upon request, the parliamentarian
 - Advises the chapter president, other officers, committees, and members on matters of parliamentary procedures (according to the *Constitution and Bylaws*, the chapter's rules of order form, policies and procedures, and *Robert's Rules of Order, Newly Revised*, current edition). *

- Calls to the attention of the president any error in the proceedings that may affect the substantive rights of any member or that might otherwise do harm to the chapter or the Sorority. *
- Sits next to the president for convenient consultation (in a low voice).

CAN PARLIAMENTARIANS VOTE?

PARLIAMENTARIANS HAVE A RIGHT TO VOTE ON CHAPTER BUSINESS, THE SAME AS ALL CHAPTER MEMBERS, IN ACCORDANCE WITH DELTA SIGMA THETA SORORITY, INCORPORATED POLICY.

THE PRESIDENT WILL VOTE ONLY IN MATTERS OF SECRET BALLOT AND/OR TO BREAK A TIE VOTE.

**Note: The President makes the final ruling after receiving parliamentary advice from the parliamentarian.*

IMPEACHMENT OF ELECTED OFFICERS

An officer elected by the chapter is expected to fulfill all of the roles and responsibilities of the position for which she was elected. In instances when this does not occur, the chapter members have the right to impeach the officer.

Officers shall be impeached for the following offenses:

- △ Criminal activities leading to conviction in a court of law (e.g. theft, drug involvement, prostitution, etc.)
- △ Violation(s) of the *Constitution and Bylaws* and the Code of Conduct of Delta Sigma Theta Sorority, Inc.
- △ Flagrant and deliberate neglect of duties and responsibilities as defined in any of the official and binding issuances or documents of the Sorority (i.e. *Constitution and Bylaws*, Code of Conduct, Chapter Management Handbook, Administrative Procedures for Membership Intake, Chapter Rules of Order, Chapter Policies and Procedures, etc.).
- △ Embezzlement of funds from the chapter.
- △ Physical, verbal or mental abuse of members.
- △ Willful and malicious destruction of materials and properties belonging to member(s), chapter(s) or Delta Sigma Theta Sorority, Inc.

In order to impeach an officer, there are several required steps which must be followed.

- △ A quorum of the chapter shall petition, to the highest-ranking officer of the chapter who is not herself the subject of the impeachment process, for the impeachment of an elected officer with the charge(s)/allegation(s) specified in writing.
- △ The Petition for Impeachment shall be given to the highest-ranking officer, who shall certify the names and signatures of the members and ascertain that the signatures have been voluntarily affixed to the petition.

If the highest-ranking officer is herself the subject of the impeachment process, the chapter shall present a Petition of Impeachment to the second highest-ranking officer and shall follow the same procedures outlined here.

- △ Within seven (7) days, the certifier shall notify in writing all of the members of the chapter, the Regional Director, the Regional Representative, the Scholarship and Standards Committee and National Headquarters that a petition has been received and a hearing shall be held within 30 days.
- △ The accused soror(s) shall be notified by certified letter with return receipt and surface mail of the charge(s)/allegation(s) by the highest-ranking officer. Copies of the Petition

For Impeachment and the Procedure for Impeachment of An Elected Chapter Officer must accompany the notification. The accused member(s) shall be relieved of her duties and responsibilities pending the outcome of the impeachment process.

- △ The highest-ranking officer (receiver of the petition) and the accused member(s) shall, within a 14-day period, mutually agree upon the date, time and location of the hearing, for the purpose of reviewing the charge(s)/allegation(s). (The date, time and location of the hearing shall be scheduled to allow for a ten-day written notification of the hearing to the membership of the chapter – this time is included in the 30 days.)
- △ If, within the above 14-day period, the accused member(s) has refused to agree to a date, time and location for the hearing, it shall proceed without the member(s). THE EXCEPTION IS IF THERE HAVE BEEN EXTENUATING CIRCUMSTANCES FOR NON-ATTENDANCE AND PROOF IS EVIDENT (such as a death or serious illness in her family, or her serious illness/hospitalization, etc.).
- △ Under the leadership of the highest-ranking officer (receiver of the petition), the membership of the chapter shall review the charge(s)/allegation(s) and information gathered at the hearing and render a confidential decision, which shall be one of the following:
 - The offense(s) is not impeachable and rehabilitation is not recommended.
 - The offense(s) is not impeachable, but rehabilitation is recommended.
 - The offense(s) is impeachable, and impeachment is effective immediately.
 - The offense(s) is unfounded (i.e. not guilty), and no action taken.
- △ Voting shall be by secret ballot in a closed session with only chapter members present. As long as a quorum is present, the impeachment vote shall be a two-thirds (2/3) vote of the financial members present and voting.

The ballots shall be tallied at the hearing by members who have been deputized for the counting by the highest-ranking officer (receiver of the petition). THE RESULTS OF THE OFFICIAL VOTE SHALL BE A PART OF THE OFFICIAL MINUTES OF THE HEARING.

- △ The decision/results of the hearing and the results of the vote taken shall be sent, in writing by the highest-ranking officer, to the members of the chapter with copies to the Regional Director, the Regional Representative, the Scholarship and Standards Committee and National Headquarters within five (5) days of the action taken.
- △ If the officer is impeached, she has the right to appeal. The appeals process is outlined on pages 160-163.
- △ If the impeachment is upheld, the office/position shall be declared vacant and the vacancy shall be filled according to the chapter's policies and procedures, if not in conflict with the Grand Chapter *Constitution and Bylaws*.

Chapter Advisors

Per the Constitution and Bylaws Article III-Chapters, Section 1 B. Collegiate Chapter Advisors, each collegiate chapter shall have one or more chapter advisor(s). Any chapter that does not have a certified advisor shall be made inactive by the Regional Director.

WHAT IS A CHAPTER ADVISOR?

Advisors are mentors who provide expert knowledge and insight to the collegiate members. They are an integral part of the organization as they are familiar with the organization's policies, available for support and openly communicate with officers and members. Communication is the key to being a successful advisor. Advisors must attend organization, officer and advisor meetings.

The advisor is expected to encourage joint program involvement; offer talent and skills for local, regional and national initiatives; submit reports of activities as well as publicize activities; and encourage graduating seniors to affiliate with an alumnae chapter as soon as they settle in their new communities after graduation. The advisor has a direct relationship with the collegiate chapter president, State Coordinator and the National Headquarters staff. She monitors the chapter to see that forms are submitted correctly and on a timely basis. She alerts the Regional Officers as soon as she realizes that a problem exists. (Many problems can be resolved before a crisis arises.)

Advisors:

- △ Are **SELECTED** and **VOTED ON** by the collegiate chapter and must submit an Advisor's Certification Form to National Headquarters annually.
- △ **Must ATTEND** Advisor's Training conducted by the Scholarship and Standards Committee every two years.
- △ **Must** register and attend the last Regional Conference or National Convention. This is **CERTIFIED** by National Headquarters.
- △ **Must** be **APPROVED** by the Regional Director.

The Advisor is KEY to the success of a chapter. Sorors who have been selected to serve as advisors or who are willing to serve must be good role models, possess a pleasant and mature personal demeanor, a positive attitude, and a stable and secure personality. They must also exhibit:

- △ **Knowledge of the Sorority**, its organizational structure and its policies, standards and procedures
- △ **Leadership** and sound management qualities
- △ **Knowledge of the university** and its policies
- △ Ability to **give and demand respect**
- △ Willingness **to give advice** when needed
- △ Ability to **communicate effectively**
- △ Ability to view matters with **objectivity**
- △ Skills to differentiate between routine and crisis situations
- △ Willingness **to teach and encourage** the collegiate member to learn all aspects of chapter management (planning, directing, coordinating, monitoring, evaluating and budgeting)
- △ Willingness **to give time** in fulfilling her role
- △ **Interest in the position and the chapter**

Advisory Team

A chapter having more than one advisor may choose to organize its advisors as an advisory team. It is recommended that a collegiate chapter have an advisory team. When this arrangement exists, the chapter will have two (2) to four (4) advisors. Each advisor has responsibility for working with a specific part of the chapter program.

The purpose of the advisory team is to discharge the duties described in ARTICLE III – CHAPTERS. The advisory team is composed of members who are qualified to be advisors and have been **elected** by the campus-based, city-wide or core chapter to serve. Members are selected to work with a specific part of the chapter program:

- △ The **Primary Advisor** coordinates the activities of the advisory team. She serves as the liaison with the Regional Officers, National Headquarters, the alumnae chapter(s) and the college/university;
- △ The **Financial Advisor** works closely with the treasurer, financial secretary, recording secretary, and finance/budget committee to ensure that all financial records are in order;
- △ The **Program Advisor** works with the projects committee and all committees involved in the planning and executing external activities which relate to the Five-Point Programmatic Thrust of the Sorority; and
- △ The **Membership Advisor** works with the Minerva Circle and all committees involved in planning and executing internal development activities relating to retention, reclamation, and intake. If the chapter has less than four advisors, a combination of duties may occur, i.e. primary/membership and finance/program, but the duties must be clearly defined.

University Faculty Advisors

When the college or university requires a faculty or staff member to be the advisor for the chapter, selection of this individual is determined by the regulations of the college/ university. Efforts should be made to secure a faculty or staff advisor who is a member of the Sorority.

SECTION V

CHAPTER STRUCTURE AND GOVERNING BODY

COMMITTEES

Executive Committee

This committee is composed of the primary elected officers: president, vice president(s), secretary (recording/corresponding), treasurer, and financial secretary. Chapters may choose to include the assistant treasurer and assistant financial secretary as members of the executive committee.

Executive Board

The Sorority coordinates the work of all officers and committees through the executive board.

- △ The executive board is composed of all chapter elected and appointed officers as well as committee chairpersons as designated by the rules of order form and policies and procedures.
- △ The chapter president is the chair of the executive board, and she prepares the agenda and presides over the executive board meetings. It is during the executive board meeting that committee chairs give progress reports and indicate when they are ready to report to the chapter.
- △ Chapter members may attend the executive board meeting as guests, with no input/voting privileges. Executive board meeting dates, place and time are provided to the chapter along with chapter meeting dates, place and time at the first chapter meeting of the year and shall be posted on a secured section of the chapter's website and/or in the monthly newsletter.
- △ Executive board meetings minutes are posted in the restricted area of the chapter's website and can be made available upon request from a chapter member.

Standing Committees

Most chapters will have a number of standing committees designated in their chapter rules of order form and policies and procedures. Standing committees usually **have a continuing task** in relation to the operation of the sorority program.

The National Scholarship and Standards Committee requires that **all** chapters have the following Standing Committees:

- Budget and Finance
- Internal Audit
- Nominating
- Policies and Procedures
- Political Awareness and Involvement/Social Action
- Program Planning and Development

Additional Standing Committees may (or may not) include:

- Arts and Letters
- Dr. Betty Shabazz Delta Academy
- Dr. Jeanne L. Noble Delta GEMS Institute
- Economic Development
- Educational Development
- EMBODI (Empowering Males to Build Opportunities for Developing Independence)
- Fundraising
- Heritage and Archives
- Hospitality
- International Awareness and Involvement
- Membership Services
- Past Presidents' Council
- Physical and Mental Health
- Protocol and Traditions
- Risk Management
- Ritual and Ceremonies
- Scholarship
- Technology

The chairpersons of these standing committees may be elected or appointed (except Nominating and Audit) as designated by the chapter rules of order form and policies and procedures. **The chairs of the Nominating and Audit Committees are elected positions.**

Special Committees

Special committees have a **specific purpose**. Special committees are **appointed for a definite program or assignment and usually with a time limit** in which to complete the assignment. When the task is done, the committee's business is considered complete and the committee is dismissed.

Special Committees may include but not limited to:

- Elections
- Founders Day
- May Week
- Minerva Circle
- Past Presidents' Council

With the exception of the Minerva Circle, the chairpersons of the special committees are appointed by the chapter president. They may meet with the executive board at her request, unless the chapter's policies and procedures specify otherwise.

- △ The Minerva Circle is elected at a meeting of the chapter following the vote to proceed with Membership Intake activities and is a **special committee** for the purpose of implementing the Membership Intake process.
- △ At the conclusion of the intake process, the Minerva Circle committee is dissolved.
- △ A chapter **may** include a past presidents' council as a special committee. This council is comprised of past chapter presidents and the council serves **strictly and only** at the request of the current president, who will appoint the chair of the council.
- △ The council shall:
 - Convene at the request of the current president when there is a need for their collective wisdom on a specific issue.
 - Report meeting results to the current president.
 - Act **only** as a resource bank and/or provide historical context to assist the current president.

Ad Hoc Committees

A one-time only committee appointed for a special assignment. An example of a special ad hoc committee is one that is created to celebrate the chapter's anniversary. Once the special assignment is completed, the ad hoc committee is dissolved.

Sub-Committees

Sub-committees are organized to carry out a task assigned to a standing or special committee and are responsible to the main committee. The sub-committee may be either standing or temporary within the main committee.

SECTION VI

CHAPTER MEETINGS

CONDUCTING CHAPTER MEETINGS

Effective and efficient management of a chapter is key to the success of the chapter. The officers of the chapter must reflect courteous, efficient, and informed leadership at all times. Delta Sigma Theta Sorority, Inc. has developed several administrative tools to assist chapter officers in the governance of their chapter and to provide the authority for certain decisions. In an effectively managed chapter, both members and chapter officers fulfill their responsibility to the chapter.

- △ Chapter members, and for collegiate chapters the advisor(s), shall be notified in advance of all regular and called meetings.
- △ To the extent possible, members shall be apprised of the meeting agenda.
- △ The advisor must attend each Executive Board and chapter meeting and may assist the chapter in planning chapter meetings.

Preparation for Chapter Meetings

Adequate preparation by the presiding officer (usually the president) will expedite the business, keep members interested and alert, and stimulate the drive to achieve the objectives for which the organization was founded.

Officers shall plan for regular and call meetings. This includes:

- △ Securing a place that is comfortable and accessible for the meeting;
- △ Establishing a time to begin and to end the meeting;
- △ Establishing a meeting agenda; and,
- △ Giving notice to the members and, for collegiate chapters, the advisor(s).

The chapter's Executive Board should meet prior to the regular meeting to determine issues to be brought before the chapter.

It is the responsibility of the president to:

1. Familiarize herself with the chapter's rules of order form, and policies and procedures;
2. Read and understand the Chapter Management Handbook, and *the Official Ritual of Grand Chapter of Delta Sigma Theta Sorority, Inc.*, and the Delta Sigma Theta Sorority, Inc. Protocol and Traditions Manual;
3. Review the glossary of parliamentary terms and correct usage of those terms;
4. Review the minutes of the previous meeting to determine which items were continued or deferred for later action;
5. Contact officers and committee chairpersons to ascertain/confirm who will be prepared to report;

6. Ask members to introduce new or necessary business, or to accept committee assignments when publicly appointed;
7. Encourage members preparing to introduce new matters to contact the president in advance, when possible, and equip themselves with a legible copy of the projected motion;
8. Encourage members making reports to be concise and to the point; provide written copies for the chapter records; and
9. Prepare an agenda which will itemize those specific matters which should be taken care of at the meeting. (*See sample copy of agenda*)

SAMPLE AGENDA

- A. Call to Order – After the Ritualistic Opening (determine if a quorum is present)
- B. Adoption of the Agenda
- C. Minutes of previous meeting(s)
- D. Introduction of National Officers or representatives on official business, if applicable
- E. Communications
 1. National Officers
 - a. Chairs of National Committees/Commissions
 - b. National Headquarters
 2. Regional Officers
 3. Other
- F. Chapter Reports
 1. President/Executive Board
 2. Officers
 3. Standing Committees (list committees reporting on agenda)
 4. Special Committees, if applicable (list committees reporting on agenda)
- G. Unfinished Business
- H. Major program emphasis
(Speaker, etc. — if non-Delta, the candles should be extinguished until after the speaker leaves; and then without words, the vice president relights the white candle and passes it to the president to relight the red candle)
- I. New Business
- J. Announcements
- K. Adjournment
- L. Ritualistic Closing

When preparing a new agenda for each meeting, the president should review the minutes of the previous meeting. The agenda should be completed prior to the meeting.

QUORUM

- △ A **quorum** is the minimum number of members who must be present at the meeting for business to be validly transacted. (*Constitution and Bylaws, Article I – Definitions, G, p.9*). It must be stated as a percentage (%).
- △ The quorum refers to the number of members present, **not** to the number of members actually voting on a particular question.
- △ A quorum that is set too low allows a limited number of members to make decisions for the chapter. If the quorum is set too high, decisions are not made because there will never be enough members present to meet the quorum.
- △ In Delta Sigma Theta Sorority, Incorporated, the quorum is stated as a percentage.
 - The quorum is listed in the chapter’s rules of order form and policies and procedures
 - The quorum for the chapter meetings should be the same percentage for the Executive Board, Executive Committee and Called meetings
 - Committees will also use the same quorum, but committee chairs will monitor the actual number of participating committee members to reach the quorum
- △ Whenever a majority vote, a two-thirds vote, or any other basis for a decision, is needed, it is understood that a quorum is present.
- △ **In the event a quorum is not present prior to the beginning of the meeting, any business transacted is null and void.**
 - The exception is that the chapter may move the following motions:
 - fix the time to which to adjourn,
 - adjourn,
 - recess, or
 - take measures to obtain a quorum
- △ A motion to obtain a quorum may be moved as a main motion when no business is pending, or as a privileged motion that takes precedence over a motion to recess. For instance, a motion that absent members be contacted during a recess would represent a measure to obtain a quorum.
 - Such motions are out of order when another has the floor;
 - Must be seconded;
 - Are debatable except when privileged;
 - Are amendable;
 - Require a majority vote; and

- Can be reconsidered.
- △ If a quorum fails to appear at a regular or properly called chapter meeting, the inability to transact business does not detract from the fact that the chapter's rules requiring the meeting to be held were complied with and the meeting was convened—**even though the meeting had to adjourn immediately.**
- △ The prohibition against transacting business in the absence of a quorum cannot be waived even by unanimous consent, and a notice cannot be validly given.
 - If there is important business that should not be delayed until the next regular meeting, the chapter should **Fix the Time to Adjourn** and then **Adjourn**.
 - If, instead, the chapter members present take action informally in the absence of a quorum, they do so at their own risk. Although the chapter can later ratify their action, it is under no obligation to do so.
- △ If a chapter continues to lack a quorum, which means that it cannot conduct chapter business, the chapter president should contact the Regional Director.
- △ In changing the chapter's quorum, the proper procedure is to move to strike out the old percentage and insert the new percentage as one motion, and then to vote on that motion.
 - Say, "I move to strike out 45% of the chapter members representing a quorum and insert 25% of the chapter members representing a quorum."
- △ When the chapter president or Presiding Officer has called a meeting to order after finding that a quorum is present, the continued presence of a quorum is presumed unless the chapter president or Presiding Officer or a member notices a quorum is no longer present.
 - If the chapter president or Presiding Officer notices the absence of a quorum, it is her duty to declare the fact, at least before taking any vote or stating the question on any new motion—which she cannot do except in connection with the motions mentioned on the previous page.
 - If a member notices the absence of a quorum, she can make a point of order at any time, except to interrupt a member who is talking.

HOW TO CONDUCT THE CHAPTER MEETING

The orderly conduct of the meeting is the responsibility of the presiding officer. Therefore, the presiding officer should:

Make full use of all Delta Sigma Theta Sorority, Inc. documents including *Grand Chapter's Constitution and Bylaws*, *Robert's Rules of Order, Newly Revised (current edition)*, chapter rules of order, chapter policies and procedures and all other administrative resources and tools. This includes the Chapter Management Handbook, *Ritual*, and Protocol and Traditions Manual.

- △ Ensure order throughout the meeting;
- △ Practice good communication;
- △ Be courteous and firm in enforcing decorum;
- △ Be impersonal. It is the "Chair," not "I" who rules, recognizes, appoints, etc. The member or soror, the committee chair, the secretary, the treasurer, not "Deborah" or "Eula," who moves, reports, reads the minutes, etc. Never permit members to indulge in personalities or name calling. Call them to order immediately, if they do.
- △ Be objective. If partisan views are to be stated by the presiding officer she must leave the Chair and return to it only after the question has been settled;
- △ Be impartial in conducting debate. Make every effort to give both sides the same opportunity to present their views;
- △ Permit relevant discussion only. Keep members' conversations on the question at issue;
- △ Make certain that amendments that are introduced are germane to the question;
- △ Be helpful to members who are in doubt of the proper procedure or the correct motion to use. Answer member's questions as precisely as possible – calling on the parliamentarian for assistance, if necessary or desirable;
- △ State the question thus: "It has been moved and seconded that we . . . Are you ready for the question? That is, if it is a debatable motion. If it is not debatable motion, proceed immediately to take the vote;
- △ Put the question thus: "All in favor of the motion as stated . . . say AYE or raise your Vote Card. Those opposed say NO, or raise your Vote Card";

- △ Announce the result: “The Ayes have it and the motion to . . . is adopted”, or “The Noes have it and the motion to . . . fails”;
- △ Tell members what to do. In taking a vote tell them to SAY AYE or NO: to STAND or be SEATED; to RAISE their hands or put them DOWN.
- △ Always take the supporting and opposing vote. In a counted vote, always announce the results in numbers. Remember that a tie vote is a failed motion;
- △ Votes with the members when the vote is by ballot (secret, electronic, etc.). When there is a tie vote, the president votes if she wishes, and understanding that her vote will change the outcome. She uses good judgment and understands the climate of the chapter. She is not required to vote. In a roll call vote (some small and collegiate chapters use roll call), the president’s name is called last.
- △ Consider a vote unanimous only after asking the members: “Is the vote unanimous?” Is there any objection to recording it as unanimous?” One objection, of course, will keep it from being unanimous;
- △ Do many things by general consent. Say, “The minutes stand approved as read (or as corrected).” “If there is no objection . . . the motion is withdrawn.” “If there is no further business . . . the meeting is adjourned.” “If there are no further nominations, the Chair declares the nominations closed.”
- △ Ensure, with the assistance of the custodian, that all ceremonial properties are in place for observance of the appropriate ritualistic ceremony.

NOTE: THE CHAPTER ADVISOR IS NOT A MEMBER OF THE COLLEGIATE CHAPTER AND, THEREFORE, IS NOT ENTITLED TO A VOTE DURING COLLEGIATE CHAPTER MEETINGS.

ELECTRONIC MEETINGS

Electronic Meetings

The National Executive Board and all regional and **chapter** committees and subcommittees shall be authorized to meet by telephone conference or through other electronic communication media so long as all members can simultaneously hear others and participate during the meeting. (*Constitution and Bylaws, Article XII*)

All communication may be sent electronically in accordance with Delta's Internet Guidelines.

RULES RELATING TO THE TRANSACTION OF BUSINESS

- △ A quorum must be present for the transaction of any chapter business to transpire. (*Quorum is defined in the Bylaws, Article I – Definitions, Section G. In Delta Sigma Theta Sorority, Incorporated the Quorum is written as a percentage, and is stated in the chapter's rules of order form and policies and procedures.*)
- △ The agenda for the chapter meeting, Executive Board meeting, or Call Meeting must be adopted at the beginning of the meeting. With the exception of the Call Meeting, the adoption of the agenda should include any changes/amendments. (*The president may adopt the agenda by consent.*)
- △ Upon being recognized by the chair, any member may speak.
- △ Business is brought before the chapter by the *motion* of a member.
- △ A majority vote is more than half of the votes cast by members entitled to vote, excluding blanks, or abstentions at a properly called meeting. (*Bylaws, Article I – Definitions, Section H*)
- △ The presiding officer speaks of herself only in the third person—that is, she never uses the personal pronoun “I.” The presiding officer always should refer herself as “the chair”—as in “the chair rules...”
- △ Members must address only the chair, or address each other through the chair. The proper method of addressing the chair, is either “Madam President” or “Madam Chair.” It is inappropriate to address the presiding officer by either her first name or as soror with her last name.
- △ Members may set a time limit on any one question. (*Motion to Limit or Extend Limits of Debate; takes precedence over all debatable motions; can be applied to any immediately pending debatable motion, to an entire series of pending debatable motions or to any consecutive part of such a series beginning with the immediately pending question; is out of order when another has the floor; must be seconded; is not debatable; and requires a two-thirds vote.*)
- △ Members may vote to limit the number of times any member may speak to any motion. (*For example, a member may be limited to speak only twice to a specified motion. Motion to Limit or Extend Limits of Debate, same as above.*)

- △ Members may set a time limit for each speaker. (*For example, a member may be limited to speaking for two or five minutes on any one issue. Motion to Limit or Extend Limits of Debate, same as above.*)
- △ Members may vote to end the debate immediately. (*The Previous Question used to bring the chapter to an immediate vote on one or more pending questions; takes precedence over all debatable or amendable motions to which it is applied; can be applied to any immediately pending debatable motion, to an entire series of pending debatable motions or to any consecutive part of such a series beginning with the immediately pending question; is out of order when another has the floor; must be seconded; is not debatable; is not amendable; requires a two-thirds vote.*)
- △ The president may have such time for her report as needed to present matters of concern to the membership. The president's report should be included on the agenda.
- △ The president shall have the authority to invite speakers and to set the time limits for the speaker. If the speakers do not deal with the concerns of Delta, then they must speak either before or at the end of the meeting.
- △ A time limit may be set by the president for reports of the officers. The time limits may be extended by a majority vote of the members present and voting.
- △ A time limit may be set by the president for reports of standing committee chairs and special ad hoc committee chairs. The time limit may be extended by a majority vote of the members present and voting.
- △ All committee reports requiring action by the members shall be presented in writing to the president and recording secretary. Proposed action suggested in reports shall be provided to the members for the chapter's approval. It is recommended that the proposed action suggested in reports be presented to the chapter in writing or projected on a screen during the meeting.
- △ It is not customary to make a motion to "receive" a communication or a committee report, which means only to permit or cause such a paper to be read. It should be noted that a motion "to receive" a communication after it has been read is meaningless and should therefore be avoided.
- △ Refreshments shall not be served during the meeting.
- △ All matters not covered by the governing documents shall be governed by the current edition of *Robert's Rules of Order, Newly Revised*.

FOLLOW-UP TO A CHAPTER MEETING

Following the meeting, the president should receive the minutes and ensure that the minutes contain the following:

- △ The time and date of the meeting, where it was held, and what happened.
- △ Record of all members present.

- △ All agenda items (and other items) discussed and all decisions reached. If action was agreed upon, record and underline the name of the member responsible for the assignment.
- △ The time at which the meeting ends (important, because it may be significant later to know whether the discussion lasted 15 minutes or 3 hours.
- △ The date, time, and place of the next meeting.

All members should receive a copy of the minutes prior to the next meeting. This is viable, when responsibilities have been given to committee members and deadlines for accomplishing said responsibilities have been agreed upon.

CONDUCTING COMMITTEE MEETINGS

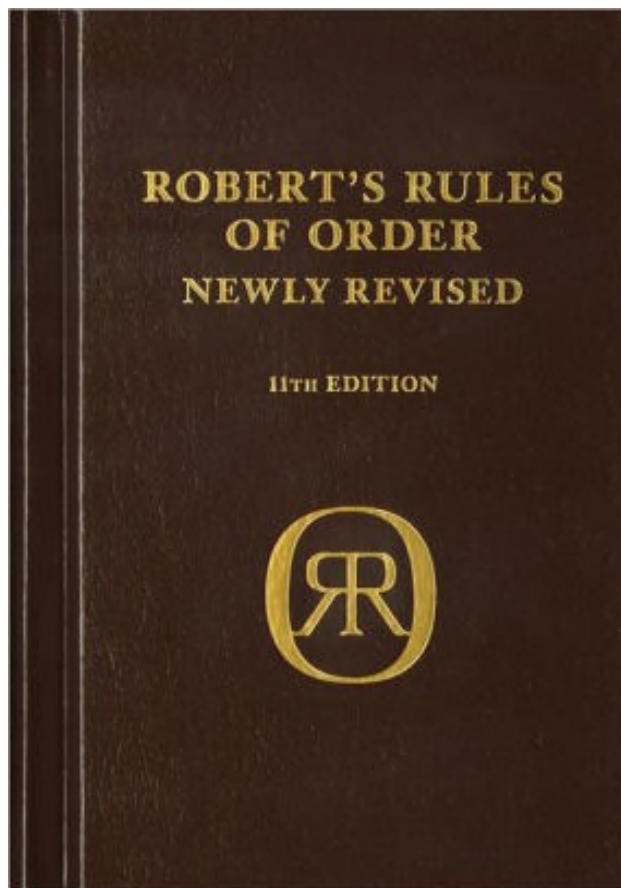
Generally, the major work of the chapter is accomplished through committees. The following guidelines are offered to the committee chairpersons:

- △ Read the chapter policies and procedures and the *Chapter Management Handbook* to determine specific committee responsibilities.
- △ Clarify all questions regarding delineated responsibilities with the chapter president.
- △ Ascertain from the president if there are additional undertakings the committee will be asked to assume.
- △ Meet with co-chairperson of the committee, (if there is one), to discuss responsibilities, views, goals and ideas the two of you have in regards to the committee's activities. Include past chairperson(s), if appropriate, to provide additional information and suggestions, etc., if needed.
- △ Prepare clearly defined goals and objectives related to the committee's responsibilities.
- △ Schedule and call the first committee meeting. Contact all members who signed up for committee.
- △ Review responsibilities, objectives and goals of the committee at the first meeting.
- △ Determine a date and time for subsequent committee meetings and reserve said date with the corresponding secretary, and the chapter Program, Planning and Development Committee Chair.
- △ Solicit volunteers to host subsequent committee meetings. Develop a list of meetings; hostesses, addresses, telephone numbers, email addresses, dates and times and give to all committee members. Determine the best method of communicating with members.
- △ Develop ideas for committee projects. Be prepared to present the committee's program for the year at the executive board meeting. Clearly written explanations of projects help others to understand and intelligently act upon the ideas proposed.
- △ Contact members who fail to attend two or more consecutive meetings to determine the cause of absence.
- △ Subsequent reports to chapter members should be for updating progress on ideas proposed or presenting new information only.

- △ Keep track of all monies spent; receipts must be attached to chapter voucher;
- △ At the end of your term of assignment, submit all records to new chairperson(s) and remain as a resource person for the new chairperson(s); and
- △ In consultation with the incoming committee chairperson(s), assist in the development of a budget request for the upcoming fiscal year.

SECTION VII

PARLIAMENTARY PROCEDURES



HOW A MOTION IS BROUGHT BEFORE THE CHAPTER

The three steps by which a motion is normally brought before the assembly are as follows:

1. A member **makes** the motion. (The words “I move that...” should be used rather than the words, “I want to make a motion.”)
2. Another member **seconds** the motion. (The words “I second the motion,” or “I second it,” or “Second” should be used.) There is no requirement that the name of the seconder be captured in the minutes; however, it is okay to include the name of the seconder.
3. The chair **states the question on the motion**. When the chair has stated the question, the motion is **pending**, that is, “on the floor.” It is then open to debate.

If the chapter decides to do what a motion proposes, it **adopts** the motion, or the motion is **carried**; if the chapter decides against doing what the motion proposes, the motion is **lost**, or **rejected**.

NOTE: Under parliamentary procedure, strictly speaking, discussion of any subject is permitted only with reference to a pending motion.

THE CONSIDERATION OF A MAIN MOTION BASIC STEPS

Once a main motion has been brought before the chapter through the three basic steps described above, there are three further basic steps by which the motion is considered in the ordinary and simplest case.

These three normal steps for the consideration of a main motion are:

1. Members **debate** the motion (unless no member claims the floor for that purpose).
2. The chair **puts the question** (that is, puts it to a vote).
3. The chair **announces the result** of the vote.

While the motion is open to debate, members may wish to take a number of actions as part of the motion’s consideration. These considerations can be the subject of certain parliamentary motions.

Remember:

- △ The presiding officer/chair *cannot close debate* so long as any member who has not exhausted her right to debate desires the floor, except by order of the chapter, which requires a two-thirds vote.
- △ The presiding officer/chair must *always call for the negative vote*, no matter how nearly unanimous the affirmative vote may appear.
- △ The presiding officer/chair should *not call for abstentions* in taking a vote, since the number of members who respond to such a call is meaningless.
- △ The presiding officer/chair's *announcement of the result* of the vote should include:
 - Report of the voting itself, stating which side "has it" – that is, which side is more numerous—or, in the case of a motion requiring a two-thirds vote for adoption, whether there are two-thirds in the affirmative.
 - Declaration that the motion is adopted or lost.
 - Statement indicating the effect of the vote, or ordering its execution, if needed or appropriate.

PARLIAMENTARY PROCEDURES

BASIC TYPES OF MOTIONS

Main Motion—A proposal that certain action be taken; means by which business is brought before an assembly

- △ Allows the group to do its work
- △ Can be made only when no other motion is pending
- △ Must be capable of standing by itself
- △ Lowest in ranked motions
- △ Requires a second, is debatable, is amendable
- △ Normally takes a majority vote

Subsidiary Motion—Relates directly to the main motion that is on the table; designed to expedite business by disposing of the pending motion other than by adopting or rejecting it.

- △ Examples: amend, lay on the table, refer to committee, limit debate, postpone definitely, postpone indefinitely, order the previous question (Call for the vote)

Incidental Motion—Deals with questions of procedure

- △ Arises out of another pending motion or item of business
- △ Is not debatable
- △ Examples: point of order, appeal, division of the body

Privileged Motion—Is not related to the business on the floor but to the rights of the members

- △ Has the right to interrupt business
- △ Because of their high privilege, is not debatable
- △ Examples: adjourn, recess, raise a question of privilege

Restorative Motion—Allows body to change a previous action

- △ Robert's Rules of Order says, "Within limits, members have the right to rethink a situation if they feel their decision has been made too quickly or without enough information."
- △ Two Types of Restorative Motions: Reconsider and Rescind:
 1. **Reconsider**—Enables a majority in an assembly within a limited time and without notice, to bring back for further consideration a motion which has already been voted on
 - Can be applied to the vote on any motion except:
 - A motion which can be renewed
 - An affirmative vote whose provisions have been partly carried out
 - An affirmative vote on a contract if the party to the contract has been notified of the outcome
 - A vote to reconsider
 - A vote which caused something to be done that is impossible to undo
 - It may only be made by someone who voted on the winning side of the motion;
 - Must be made during the same or next session.
 - Must be seconded
 - Is debatable
 - Is not amendable
 - Cannot be reconsidered
 2. **Rescind**—Amends something that was previously adopted; allows the chapter to change an action previously taken or ordered
 - Used to change part of the text or substitute a different version
 - Takes precedence over nothing
 - Can be applied to anything
 - Is out of order when another has the floor
 - Requires previous notice or 2/3 vote if not
 - Must be seconded
 - Is debatable
 - Negative vote on this motion can be reconsidered, but not an affirmative vote

Motions - Order of Precedence (Highest to Lowest)

- △ **Privileged Motions – (Highest)**
- △ **Subsidiary Motions**
- △ **Main Motion – (Lowest)**

Unranked Motions

- △ Incidental Motions
- △ Restorative Motions

Parliamentary Motions Guide

Based on *Robert's Rules of Order, Newly Revised, 11th Edition*

The **motions** below are listed in order of precedence (highest to lowest). Any motion may be introduced if it is higher on the chart than the pending lower motion.

You Say:	If You Want TO:	Interrupt?	2nd?	Debate?	Amend?	Vote?
I move to adjourn	Close meeting	No	Yes	No	No	Majority
I move to recess for	Take break	No	Yes	No	Yes	Majority
I rise to a question of privilege	Register complaint	Yes	No	No	No	None
I call for the orders of the day	Make follow agenda	Yes	No	No	No	None
I move to lay the question on the table	Lay aside temporarily	No	Yes	No	No	Majority
I move the previous question	Close debate	No	Yes	No	No	2/3
I move that debate be limited ...	I move that debate be limited to	No	Yes	No	Yes	2/3
I move to postpone the motion to ...	Postpone to a certain time	No	Yes	Yes	Yes	Majority
I moved to refer the motion to ...	Refer to committee	No	Yes	Yes	Yes	Majority
I move to amend the motion by ...	Modify wording of motion	No	Yes	Yes	Yes	Majority
I move that the motion be postponed indefinitely	Kill main motion	No	Yes	Yes	No	Majority
I move that (or 'to') (main motion)	Bring business before assembly	No	Yes	Yes	Yes	Majority, with some exceptions

Parliamentary Motions Guide

Based on *Robert's Rules of Order Newly Revised, 11th Edition*

Incidental Motions – No order of precedence. Arise incidentally and are decided immediately

You Say:	If You Want TO:	Interrupt?	2 nd ?	Debate?	Amend?	Vote?
Point of order	Enforce rules	Yes	No	No	No	None
I appeal from the decision of the chair	Submit matter to assembly	Yes	Yes	Varies	No	Majority
I move to suspend the rules which ...	Suspend rules	No	Yes	No	No	2/3
I object to the consideration of the question	Avoid main motion altogether	Yes	No	No	No	2/3
I move to divide the question	Divide motion	No	Yes	No	No	Majority
I call for a division	Demand rising vote	Yes	No	No	No	None
Parliamentary inquiry	Parliamentary law question	Yes (if urgent)	No	No	No	None
Request for information	Request information	Yes (if urgent)	No	No	No	None

Restorative Motions: Motions that bring a question again before the assembly – no order of precedence. Introduced only when nothing else is pending.

You Say:	If You Want TO:	Interrupt?	2 nd ?	Debate?	Amend?	Vote?
I move to take from the table ...	Take matter from table	No	Yes	No	No	Majority
I move to rescind/amend something previously adopted	Cancel or change previous action	No	Yes	Yes	Yes	2/3 or majority with notice
I move to reconsider the vote ...	Request information	No	Yes	Varies	No	Majority

PARLIAMENTARY PROCEDURES

HOW TO AMEND A MOTION

The motion to Amend is the most frequently used and most important of the subsidiary motions.

The motion to Amend can cause the most confusion.

- △ To **Amend** a motion means to change the wording of a motion *before* voting upon the motion in order to make it
- Clearer,
 - More Complete, or
 - More Acceptable

- △ The **Amending** process allows the group to change the proposed motion to more clearly represent the will of the group. Robert's Rules of Order calls this "perfecting the motion."
- △ An **Amendment** must be *germane* to the motion on the floor to be in order. New business may not be introduced under the pretext of an amendment.

There are three ways to amend a motion:

- △ To **add** words or phrases.
- △ To **strike out** words or phrases.
- △ To **substitute** by:
 - Striking out and inserting words;
 - Substituting an entire motion or paragraph.

An Amendment may also be amended.

- △ The first amendment is called a **primary** amendment and
- △ The amendment to the amendment is called a **secondary** amendment.

Only two amendments may be pending at any one time. (In other words, an amendment to an amendment to an amendment is not in order; otherwise, the members would become hopelessly confused.)

The process of amending an amendment:

- △ First vote on: the amendment to the amendment (the secondary amendment).
- △ Next vote on: the original amendment (the primary amendment)
- △ Finally vote on: the main motion (which may or may not have been amended).

PARLIAMENTARY PROCEDURES WHEN and HOW TO USE A MOTION *IF..., THEN SAY....*

If the Agenda is Not Being Followed and a Member Wants to Get the Chair Back on Track...

Say, "**I CALL FOR THE ORDERS OF THE DAY**": (no second, no vote*, no debate) (a.k.a. "to enforce the schedule") if the agenda is not being followed, a member may call for the orders of the day.

*Must be enforced immediately unless there is a 2/3 vote to set aside the orders of the day. This is a **Privileged** motion.

If a Member feels that the Rules of the Assembly Have Been Violated...

Say aloud, "**POINT OF ORDER**": (no second, no vote, no debate): when a member thinks the rules of an assembly have been violated, she may make a point of order, thereby calling for the chair's ruling to restore order. This is an **Incidental** motion.

If there is a Problem in the Room (Air Conditioning, etc.)...

Say, "**I RAISE A QUESTION OF PRIVILEGE**" to Make an Urgent Request about a Person's Rights: (no

second, no vote, no debate) allows a request or main motion to be brought up immediately because of its urgency, while doing so would typically be called out of order. There is no debate and no vote as the chair rules on the matter of privilege or not. This is a **Privileged** motion

If a Member has a Question for the Chair on a Matter of Parliamentary Procedure...

Say, "**I RAISE A QUESTION OF PARLIAMENTARY INQUIRY**": (no second, no vote, and no debate) a member may request of the chair her ruling on the matter of parliamentary procedure. This is answered by the chair. This is an **Incidental** motion.

If a Member Wishes to Discuss an Item Earlier than It is on the Agenda...

Say, "**I MOVE TO SUSPEND THE RULES**": (needs second, 2/3, no debate) a motion that is used when the assembly wants to discuss an issue in a way that violates standing rules or rules or order; may not interfere with the organizational bylaws and may not be made when a question is pending. This is an **Incidental** motion.

If a Member Feels Tired and Wants a Recess...

Say, "**I MOVE TO RECESS**": (needs second, majority vote, no debate) allows for a short intermission; acts as a privileged motion only if a main motion is pending. *If no motion is pending, this motion is actually a main motion to recess.* This is a **Privileged** motion.

If a Member Wishes to Adjourn at a Certain Time...

Say, "**I MOVE TO FIX THE TIME TO WHICH TO ADJOURN**" (needs second, majority vote, no debate) This motion may be used when a quorum is not present. This is a **Privileged** motion.

If a Member wants to Adjourn the meeting...

Say, "**I MOVE TO ADJOURN**": (needs second, majority vote, no debate). This is a **Privileged** motion.

If a Member Wishes to Consider Separate Parts Only of a Motion, or to Vote on the Motion Piece by Piece...

Say, "**I MOVE THE DIVISION OF THE QUESTION**": (needs second, majority vote, no debate) When a motion contains several parts which may be individually debated, a motion may be *divided* (known as "division of the question" or to "divide the question.") This is an **Incidental** motion.

If a Member Wishes to Have More Information on a Matter Being Debated...

Say aloud, "**POINT OF INFORMATION**": (no second, no vote, and no debate) a request for information about the matter being debated; also answered by the chair. This is an **Incidental** motion.

If a Member Wishes to Alter or Change a Main Motion While It is being Considered...

Say, "**I MOVE TO AMEND THE MOTION BY....**": (needs second, majority vote, debatable) allows a motion to become more specific when the motion is unclear or broad. This is the most common

of subsidiary motions used in an assembly. An amendment must be *germane*, that is, it must have bearing on the subject of the motion being amended. This is a **Subsidiary** motion.

If a Member Wishes to Take Back or Modify a Motion Made While It is Pending...

Say, “**I MOVE TO WITHDRAW OR MODIFY THE MOTION**”: (no second, consent or majority with objection, no debate) used only when a motion is *pending*. Remember, after the chair restates a motion or resolution, it becomes the property of the assembly. If there is an objection to consent, the chair may request a subsidiary motion of amend. This is an **Incidental** motion.

If a Member Wishes to Immediately End Discussion of a Question and Take an Immediate Vote...

Say, “**I MOVE THE PREVIOUS QUESTION**”: (needs second, 2/3, no debate), (a.k.a. "motion to close debate"), when members wish to bring a motion to an immediate vote they may "move the previous question" to limit discussion. This is a **Subsidiary** motion.

If a Member Questions the Result of a Vote...

Say, “**I MOVE THE DIVISION OF THE ASSEMBLY**”: (no second, no vote, no debate) (a.k.a. "calling for a division," not to be confused with the "division of a question") if any member questions the result of a voice vote or a show of hands, the member may call for a division, thereby requiring the vote be taken again by rising. This is an **Incidental** motion.

If a Member Wishes to Not Even Consider a Motion Brought before the Assembly because it is Embarrassing...

Say, “**I MOVE THE OBJECTION TO THE CONSIDERATION OF THE QUESTION**”: (no second, 2/3 against consideration required to sustain objection, no debate) after a motion has been made, but before debate on the motion occurs, a member may motion to object to the consideration of a question. The purpose of the motion is not to cut off debate but to prevent discussion of a pointless or potentially inflammatory topic. This is an **Incidental** motion.

If a Member Wishes to Send a Motion to a Committee for Further Study and/or Redrafting...

Say, “**I COMMIT OR REFER THIS MOTION TO COMMITTEE**”: (needs second, majority vote, debatable) allows the motion to be sent to a committee for further study or redrafting. This is a **Subsidiary** motion.

If a Member Wishes to Take a Second Look at a Motion which was Passed...

Say, “**I MOVE TO RECONSIDER THE MOTION TO....**”: (needs second*, majority vote, debatable) allows a group to reconsider the vote on a motion. ***It may only be made by someone who voted on the winning side of the motion; this is to help prevent abuse. As well, there is a time limit on any motion to reconsider**, generally during the same or next session. This is a **Restorative** motion.

If a Member Wishes to Negate a Previously Adopted Motion...

Say, “**I MOVE TO RESCIND**”: (needs second, majority vote, debatable, is amendable, and under certain circumstances requires *previous notice* or 2/3 vote) a motion by which the body can

change an action previously taken or ordered. There is an explicit right of any member to make the motion, without time limit, unlike the case in *take from the table*. This is a **Restorative Motion**.

If a Member Wishes to Amend a Motion which has Already Passed...

Say, **"I MOVE TO AMEND THE MOTION PREVIOUSLY ADOPTED THAT...."**: (needs second, majority vote, debatable, is amendable, and under certain circumstances requires *previous notice* or 2/3 vote) also is a motion that can be used if it is desired to change only a part of the text, or to substitute a different version. Is another form of the motion to *Rescind*, and has the same rules as the motion to *Rescind*. This is a **Restorative Motion**.

If a member wishes to **not take a position on a question in order perhaps to revisit the motion at a later time,**

There are Three Methods the member may use:

1. **TO TEMPORARILY REMOVE THE QUESTION – USE: LAY ON THE TABLE:** (needs second, majority vote, no debate.) Say, **I MOVE TO LAY ON THE TABLE, THE FOLLOWING MOTION....**
 - a) When members wish to set aside a motion **TEMPORARILY** when something else of immediate urgency has arisen or when something else needs to be addressed before consideration of the pending question is resumed in such a way that
 - i) There is no time set for taking the matter up again; but its consideration can be resumed at the will of a majority and in preference to any new questions that may then be competing with it for consideration.
 - b) **The motion TO LAY ON THE TABLE is often misused in place of the motion to *Postpone Indefinitely*, to *Postpone to a Certain Time*, or other motions.**
 - i) The motion to LAY ON THE TABLE is out of order if its intent is to "kill" debate, the motion to *Postpone Indefinitely* should be used.
 - ii) If a time for resuming consideration is specified in making the motion, the appropriate motion to use is the motion to *Postpone*, which is debatable.
 - c) A question that has been LAID ON THE TABLE may be removed from the table with a motion to *Take from the Table* as soon as
 - i. The interrupting business is disposed of; or
 - ii. When no question is pending; or
 - iii. In the same or subsequent session through a majority vote.
 - d) If the question is *not taken from the table* by the next meeting of the assembly, it dies but may be reintroduced later as a new question. To **Lay on the Table** is a **Subsidiary** motion.
2. **TO REMOVE THE QUESTION UNTIL A CERTAIN TIME – USE: POSTPONE TO A CERTAIN TIME:** (needs second, majority vote, debatable) (a.k.a. "postpone to a certain time") allows the assembly to postpone consideration of a question to a future time or date or later in the same meeting. Should not be confused with "postpone indefinitely" which actually kills the motion. To **postpone to a certain time** is a **Subsidiary** motion.

3. **TO REMOVE THE QUESTION INDEFINITELY – USE: POSTPONE INDEFINITELY:** (needs second, majority vote, debatable) this is a motion used if the assembly declines to take a position on the main question. Its adoption kills the main motion (for the duration of the session) and avoids a direct vote on the question. To **postpone indefinitely** is a **subsidiary** motion.

PARLIAMENTARY PROCEDURES

GENERAL QUESTIONS RELATED TO MOTIONS

Is the motion in order?

Motions must relate to the business at hand and be presented at the right time. In order to have business on the floor, a motion must be made. It must not be obstructive, frivolous or against the Grand Chapter or the chapter's policies and procedures or rules of order form.

May the speaker be interrupted?

Some motions are so important that the speaker may be interrupted to make the motion; for example, Point of Order, Appeal, Object to the Consideration of the Question, Call for a Division, Parliamentary Inquiry, Request for Information. The original speaker regains the floor after the interruption has been attended to.

Is a second needed?

Usually, yes! A second indicates that another member would like to consider the motion. It prevents spending time on a question that interests only one person.

Is the motion debatable?

Parliamentary procedure guards the right to free and full debate on most motions. However, some subsidiary, privileged and incidental motions are not debatable.

Can the motion be amended?

Some motions can be changed by *striking out* or *inserting wording*, or both. Amendments must relate to the subject as presented in the main motion.

What vote is needed?

Most require only a **majority vote** (*more than half of the votes cast by members legally entitled to vote, excluding blanks or abstentions at a properly called meeting*). However, **motions concerning the rights of the assembly or its members need a 2/3 vote** to be adopted.

Can the motion be reconsidered or rescinded?

Some motions can be debated again to give members a chance to correct a hasty, ill-advised or erroneous action or take into account added information or a changed situation since the vote was taken. The motion to **reconsider must come from the winning side**. The vote to **rescind requires a 2/3 vote or a majority with notice**.

SECTION VIII

GENERAL POLICIES

GENERAL POLICIES

While some of the titles of the policies include the designation of collegiate or alumnae; please note, all chapters are expected to adhere to these policies.

In addition, the policies are included in the National Scholarship and Standards (Scholarship and Standards) ***“Hot Off the Press.”*** (*Hot Off the Press* is located on the National Delta Sigma Theta Sorority, Inc. website, >Members Only> National Committees>Scholarship and Standards. *Hot Off the Press* is an informal Scholarship and Standards policy announcement page).

This section of the Chapter Management Handbook will be fluid as policies are developed, approved, and announced/published in *Hot Off the Press* by the Scholarship and Standards Committee.

Policies (in alphabetical order) included in this section are:

- A. Affiliate Groups/Committee Prohibition
- B. Alcohol and Illegal Drug Use Policy
- C. Collegiate Pageants
- D. Expelled Member Letter
- E. Funeral – Memorial Policy
- F. Guidelines for Collegiate Chapter Anniversaries and Reunions
- G. Honorary Members – Chapter Affiliation
- H. Perpetrators Policy
- I. Policy Statement on Wearing Your Letters/Symbols
- J. Probation Policy – Chapters/Members
- K. Selection/Election of Other Delta Related Representatives/Awardees
- L. Solicitation of Funds Policy for Deltas and Non-Deltas
- M. Proper Solicitation of Funds Managed Through the Chapter
- N. Step Show Participant Guidelines for Deltas and Non-Deltas
- O. Transgender Membership Policy

A. Prohibition on Establishing and Operating Affiliate Groups and/or Committees within Chapters

It is the policy of Delta Sigma Theta Sorority, Incorporated (“Delta”) that no organization or group shall be identified or recognized as a committee or affiliate of or within the structure of any chapter of Delta if the organization (hereinafter “independent organization”) meets any of the following criteria:

- △ Operates pursuant to established policies and procedures, protocol, or operating guidelines of any kind;
- △ Is governed by an elected or appointed Board of Directors and/or elected or appointed officers;
- △ Has standing or ad hoc committees;
- △ Holds in its name a checking, savings, investment, or other account at a bank or other financial institution;
- △ Is registered to do business in a state or as a tax exempt organization;
- △ Has a mailing or delivery address in the name of the entity; or
- △ Collects or assesses membership dues, fees, or assessments.

Any affiliation or association with any such independent organization is inappropriate and is prohibited because of potential legal, fiscal and/or fiduciary ramifications.

Any chapter that currently has any arrangement or association with any independent organization or group that falls within the above-enumerated categories shall dissolve such arrangement immediately; shall formally disassociate the local chapter from the independent organization; and shall notify the Regional Director in writing of the disassociation action.

To demonstrate “formal disassociation,” at a minimum, a chapter shall:

- △ Record in the chapter minutes an official chapter action denoting the disassociation;
- △ Inform chapter members of the disassociation through various and several means of communication and direct them to cease and desist all actions (including actions described in this policy) that would imply any affiliation or association with the independent organization;

- △ Cease and desist any and all references to and use of any stationery or printed materials that reflect or imply, directly or indirectly, any association or joint action with the independent organization;
- △ Cease and desist any electronic or online uses or postings (including through social media) that imply, either directly or indirectly, an association or affiliation with the independent organization;
- △ Send dated and written correspondence to the independent organization explicitly informing it of the disassociation and directing it to cease and desist any and all references to and use of any stationery or printed materials or electronic postings (including through social media) that reflect or imply, directly or indirectly, any association or joint action with Delta.

Any chapter that has questions about this policy, including its implementation, shall contact their Regional Member, National Scholarship and Standards Committee.

Examples of such associations and/or affiliations include but are not limited to:

Zeta, Zeta, Zeta Affinity Group or any college or university affinity group;
College/University Alumnae Associations
Church or any religious affinity group
Jack and Jill, Inc.;
Junior League;
Order of the Eastern Star;
Sertoma;
Toastmasters
Weight Watchers

B. Alcohol and Illegal Drug Usage Policy

DELTA SIGMA THETA SORORITY, INCORPORATED A Service Sorority

ALCOHOL AND ILLEGAL DRUG USAGE POLICY (Approved by the National Executive Board August 2, 2017)

EXECUTIVE SUMMARY

Delta Sigma Theta Sorority, Incorporated (“Delta”) is revising its alcohol and drug policy to ensure that, to the maximum extent possible, the policy protects members, the public, and Delta’s interests and resources.

With respect to alcohol use, the revised policy strictly prohibits the use of alcohol: by collegiate chapters, members, and sorors at any event that reasonably could be characterized as a chapter event by an outside observer; at conferences and conventions; in association with any of Delta’s trademarks; and in any celebration of Founders Day. The policy regulates the use of alcohol by alumnae chapters. As it relates to drug use, the policy strictly prohibits the use of illegal drugs or controlled substances, including prescription drugs obtained without a prescription and including marijuana in those states that have approved its use. The policy provides that disciplinary action will be imposed upon anyone who violates the policy.

Read the full policy, but the salient points relating to the use of alcohol are:

1. **Collegiate Chapters:** Collegiate chapters, members, and sorors are strictly prohibited from using alcohol or supporting the use of alcohol in any way. To facilitate compliance, collegiate members are prohibited from the following: having alcohol available at any event; sponsoring or co-sponsoring an event where the host organization purchases or serves alcohol; posting pictures or videos on social media (or otherwise circulating pictures) of attendees drinking at any chapter event; purchasing alcohol using chapter funds; and holding rush or intake-related events at establishments where alcohol is served.

2. **Alumnae Chapters:** Among the twenty-four (24) regulated practices relating to the use and sale of alcohol by alumnae chapters are these: alcohol must be served by a licensed, third-party vendor, with whom the chapter has entered into a written agreement; non-alcoholic options must be available at all events; food must be served at all events where alcohol is served; chapters must not serve alcohol at any RUSH or intake-related activity; chapters may not sponsor or co-sponsor any event where the host organization purchases or serves alcohol; Delta shall not be a party to the contract the chapter signs with the vendor; members shall not post pictures or videos on social media (or otherwise circulate pictures) of attendees drinking alcohol at any chapter event.
3. **Conventions:** Delta strictly prohibits the use or consumption of alcohol at conferences and conventions and assumes no responsibility or liability for any injury or damage relating to the use or consumption of alcohol by any member of Delta or any attendee. Contracts for these events must embody Delta's policy.
4. **Intellectual Property:** No chapter, member, or soror shall use or authorize the use of any image of the Founders (individually or collectively) or any of Delta's intellectual property, including any iteration of its name, in the promotion of any alcohol, or at any event where alcohol is being sold.
5. **Founders Day Events:** Chapters, members, and sorors shall not host Founders Day events at a night club or any venue where alcohol is being served.

All national and chapter officers, all members of Delta, and all sorors who attend any activity or event that *reasonably could be characterized as a chapter event* by an outside observer shall be responsible for reading and following the full policy. The above is only a summary of the policy. In enforcing the policy, Delta will apply a "knew or should have known" standard as it relates to the details of the policy.

I. BACKGROUND AND REASON FOR THE POLICY

Delta is an organization incorporated under District of Columbia not-for-profit law. Thus, the leaders of Delta have a fiduciary duty to act responsibly and in the best interest of Delta at all times. That duty encompasses staying informed of laws that affect the organization and promulgating and implementing policies that are consistent with applicable laws and with the policies of colleges and universities ("universities") that host Delta chapters. One area where state legislatures and universities have taken action that requires Delta to reexamine its existing policy is that of alcohol consumption. Many states have enacted or strengthened laws designed to ensure the safety of the citizens of their state. Universities likewise have promulgated policies

designed to keep students safe while also safeguarding the institution's resources. This heightened scrutiny results in large measure from the devastating consequences of intoxicated persons engaging in reckless behavior, including the overwhelming evidence linking violent behavior (including incidents of hazing) and sexual assault on and off college campuses to drinking and illicit drug use.

The Federal Trade Commission has stated that many state laws provide that "social hosts" are responsible for underage drinking on property they own, lease, or otherwise control, irrespective of whether the social hosts actually provide the alcohol. In many respects, however, state laws regulating alcohol and drug use vary widely, including as to the age at which one may legally consume alcohol. Similarly, policies of universities vary widely.

Because of the variances in state laws and university policies; because college students invariably will include underage students; because the consequences for alcohol abuse are horrific (death, violence, sexual abuse); and because of the huge liability that would face Delta and/or one of its chapters for alcohol-related damages, the prudent course for Delta leadership in exercising their fiduciary duty is to prohibit the use of alcohol by collegiate chapters and members, and to promulgate rigorous standards under which alumnae chapters and members may use alcohol.

Promulgating a policy that strictly prohibits the use of illegal drugs or controlled substances, including prescription drugs obtained without a prescription and including marijuana in those states that have approved its use, promotes the above objectives.

II. ALCOHOL

A. POLICY APPLICABLE TO COLLEGIATE CHAPTERS

This policy applies to all sorors and members (financial and non-financial) of Delta matriculating in a college/university setting.

Delta **strictly prohibits** the use or consumption of alcoholic beverages at any activity or event ***that reasonably could be characterized as a chapter event by an outside observer*** ("event" or "activity"). Thus, no member of Delta shall consume, dispense, share, serve, or otherwise distribute any kind of alcoholic beverages at any event that may reasonably be characterized as a chapter event, whether the event is a formal event or an informal, social gathering. Members and the chapter shall comply with the letter and the spirit of the prohibition policy. The following terms are designed to help you achieve strict compliance:

1. In announcing or advertising a party or other event or activity, neither the chapter, nor any member of the chapter, shall announce, advertise, or mention -- through word of mouth; a flyer; any form of social media; or any other means -- that alcoholic beverages will be

available at the party or event. No alcoholic beverages should be available at the party or event.

2. A chapter shall not post on the chapter's website or any form of social media any videos or pictures of any attendee drinking alcoholic beverages at any chapter event.
3. No member of a chapter shall post on any form of social media any videos or pictures of any attendees drinking alcoholic beverages at any event.
4. No member or soror shall post a video or pictures of herself or others drinking or handling alcoholic beverages while wearing Delta paraphernalia.
5. A chapter shall not use chapter funds to purchase alcoholic beverages on behalf of the chapter, or for any member or guest of the chapter, or to participate in activities sponsored by other organizations. This restriction prohibits the pooling of funds by individual chapter members or sorors to purchase alcoholic beverages. No funds collected by the chapter in any form may be used to purchase alcoholic beverages.
6. A chapter shall not sponsor, co-sponsor, or co-finance an activity at an establishment at which alcoholic beverage will be sold, given away, or otherwise provided to those present, except as specified in Section II-A-9 of this policy. Renting a closed area within an establishment that sells or provides alcoholic beverages to other guests would not constitute sponsoring or co-sponsoring.
7. Notwithstanding the provision in Number 6 above, no rush or intake-related activities shall be held or conducted at an establishment that sells or otherwise distributes alcoholic beverages, unless the activities have been approved by the Regional Director. The Regional Director's approval of the venue for holding such activities shall not be construed as approval of the serving or dispensing of alcoholic beverages at such activities.
8. A chapter shall not co-sponsor, co-finance, or participate in (in any way) an event or activity in which the host chapter, organization, or group purchases, serves, or otherwise dispenses alcoholic beverages, except as specified in Section II-A-9 of this policy.
9. For any collegiate activity that the chapter traditionally has co-sponsored or co-financed, or that is congruent with the chapter's service mission, at which alcoholic beverages will be served, the chapter may co-sponsor or co-finance the activity so long as all promotional materials, and all contracts, memoranda of understanding or other agreements include the following disclaimer: "No portion of the funds contributed by the _____ Chapter of Delta Sigma Theta Sorority, Incorporated have been used to procure or pay for the serving or dispensing of alcoholic beverages. The _____ Chapter of Delta strictly prohibits the sale, consumption, or serving of

alcoholic beverages at any of its activities. It assumes no responsibility for, and shall not be liable for, any injury or damage relating to the consumption of, or the sale, or serving of, alcoholic beverages by any person in attendance at this event.

10. At any event that reasonably could be characterized as a chapter event by an outside observer, no member or soror attending the event shall participate in any type of drinking game; no member or soror attending the event shall encourage any other member or soror to participate in any type of drinking game; and no member or soror attending the event shall encourage or permit a prospective member to engage in any type of drinking game.

B. POLICY APPLICABLE TO ALUMNAE CHAPTERS

This policy applies to all chapters, sorors, and members (financial and non-financial) of Delta who attend or sponsor any activity or event ***that reasonably could be characterized as a chapter event by an outside observer*** (“event” or “activity”), whether the event is a formal event or an informal, social gathering. Members, sorors, and the chapter shall comply with the letter and the spirit of the policy. The following terms are designed to help you achieve strict compliance:

1. When serving alcoholic beverages at any event, use third party vendors (hereinafter “vendors”) to serve, dispense, and/or sell the alcoholic beverages.
2. Require all vendors to be licensed, bonded, and insured. The amount and type of insurance shall be pursuant to the terms specified in chapter management financial policy documents, or as specified by Delta’s insurance brokers.
3. Ensure that all vendors agree in writing to be responsible for providing, dispensing, and serving all alcoholic beverages during the event; maintaining control of all alcoholic containers during the event; and removing all alcoholic beverages from the premises at the conclusion of the event.
4. Require vendors to have available non-alcoholic options, such as water and soft drinks.
5. At events where alcoholic beverages will be served, have food available.
6. Require the vendors to agree in writing that they shall not serve alcoholic beverages to anyone under the age of 21 years old (or the age stated in the applicable state law for serving alcoholic beverages), and have the vendors agree that they will confirm the age of all individuals to whom alcoholic beverages are served.

7. Require all vendors to agree that they will not serve alcoholic beverages to anyone who appears to be intoxicated.
8. A chapter shall not share profits with any vendor hired to sell, dispense, or serve alcoholic beverages at a chapter event.
9. All agreements with vendors shall be in writing and shall require the vendor to indemnify the chapter, its officers and members, and Delta and its officers, Executive Board members, and members (if Delta is made a party to any claim for loss or injury) for any loss relating to or arising out of the service provided by the vendors.
10. All agreements with any vendor shall be between the vendor and the chapter. Delta Sigma Theta Sorority, Incorporated shall not be listed as a party to any agreement, and its name shall not be included in the agreement, except to identify the chapter.
11. Chapters are responsible for purchasing any additional insurance coverage (*e.g.*, special events coverage) needed to cover events where the chapter allows alcoholic beverages to be served, and they shall plan activities sufficiently early to allow time to purchase the additional insurance coverage.
12. No member or their guests shall consume alcoholic beverages while in the presence of minors who are attending or participating in any Delta youth initiative program (*i.e.*, GEMS, Delta Academy, EMBODI, or any other Delta-sponsored youth program.).
13. A chapter shall not use chapter funds to purchase alcoholic beverages on behalf of the chapter, or for any member or guest of the chapter. No funds collected by the chapter in any form may be used to purchase alcoholic beverages.
14. Chapters may only have events where alcoholic beverages are served through a third-party vendor.
15. No member (individually, collectively, or in the name of the chapter) shall serve, dispense, or sell alcoholic beverages to anyone.
16. In announcing or advertising a party or other event or activity, neither the chapter, nor any member of the chapter, shall announce, advertise, or mention -- through word of mouth, a flyer, any form of social media, or any other means -- that alcoholic beverages will be available at the party or event.
17. A chapter shall not post on the chapter's website or any form of social media or otherwise circulate or distribute any videos or pictures of any attendees drinking alcoholic beverages

at any event that reasonably could be characterized as a chapter event by an outside observer.

18. No member of a chapter or soror shall post on any form of social media or otherwise circulate or distribute any videos or pictures of any attendees drinking alcoholic beverages at any event that reasonably could be characterized as a chapter event by an outside observer.
19. No member or soror shall post a video or pictures of herself or others drinking or handling alcoholic beverages while wearing Delta paraphernalia.
20. A chapter shall not offer as a raffle gift any kind of alcoholic beverages, even if the beverages have been donated by a third party.
21. A chapter shall not sponsor or co-sponsor an activity at any establishment at which alcoholic beverages will be sold, given away, or otherwise provided to those present. Renting a closed area within an establishment that sells or provides alcoholic beverages to other guests would not constitute co-sponsoring.
22. A chapter shall not serve or have present alcoholic beverages at any RUSH or intake-related activities, at any candidates' orientation, or at any chapter membership intake activity.
23. A chapter shall not co-sponsor, co-finance, or participate in (in any way), an event or activity in which the host chapter, organization, or group purchases or serves alcoholic beverages other than through a third-party vendor.
24. At any event that reasonably could be characterized as a chapter event by an outside observer, no member or soror attending the event shall participate in any type of drinking game; no member or soror attending the event shall encourage any other member or soror to participate in any type of drinking game; and no member or soror attending the event shall encourage or permit a prospective member to engage in any type of drinking game.

C. POLICY APPLICABLE TO CONFERENCES AND CONVENTIONS

Delta strictly prohibits the sale, consumption, or serving of alcoholic beverages at any of its conferences or conventions. It assumes no responsibility for, and shall not be liable for, any injury or damage relating to the consumption, sale, or serving of alcoholic beverages by any member of Delta or any guest attending any Delta conference or convention activities. All contracts for all banquets or other events shall include language embodying Delta's policy. It shall be clear in contracts and printed programs that receptions or events sponsored by third parties

during a conference or convention and at which alcoholic beverages will be served or sold shall not be deemed a Delta event.

D. POLICY APPLICABLE TO USE OF DELTA’S LOGOS AND NAMES AND /OR IMAGES OF DELTA’S FOUNDERS

No chapter, member, or soror may use, or authorize any other individual, business entity, or organization to use, the name or image of Delta’s Founders (individually or collectively), any iteration of Delta’s name, or any Delta trademark (names, symbols or logos) on any alcoholic beverage or in the promotion of any alcoholic beverage in any manner.

E. POLICY APPLICABLE TO USE OF ALCOHOLIC BEVERAGES IN CELEBRATING DELTA’S FOUNDERS DAY

No chapter, member, or soror shall host an event purporting to celebrate Delta’s Founders Day in a nightclub, bar, or any venue where alcoholic beverages are distributed in any manner. Renting a closed area within an establishment that sells or provides alcoholic beverages to other guests would not violate this policy.

III. DRUGS

No chapter, member, or soror shall possess, distribute, or use illegal drugs or controlled substances (including prescription drugs obtained without a prescription), or drug paraphernalia while attending or participating in any activity or event that reasonably could be characterized as a chapter or Delta event or activity by an outside observer. To reiterate, Delta strictly prohibits the use of any kind of illegal drugs, including marijuana in those states that have approved its use.

IV. DISCIPLINE

Any violations of this policy should be reported **immediately**. You should make your report in the following order: to the chapter president; the chapter advisor(s); **and** the Regional Director and Regional Representative; and/or to the National First Vice President and the Executive Director of Delta. If the chapter president and/or chapter advisor is involved, or if you do not receive a positive response, you should immediately escalate the reporting to the next level. You always have the option of contacting the National First Vice President and/or the Executive Director directly, at any time. You have been provided their names and contact numbers.

Delta will impose disciplinary action on anyone who violates the above standards of conduct. The nature of the sanction will be appropriate as outlined in the Code of Conduct.

C. Collegiate Pageants

Similar to Jabberwock, collegiate pageants are generally a cultural fundraising activity that seeks to render entertainment of the highest caliber.

The name of the pageant should not include the Sorority's name (Delta Sigma Theta Sorority, Incorporated) or initials (DST).

- △ The overall purpose of the pageant is scholarship, charity, or another worthy cause.
- △ The pageant usually involves/showcases talent and a series of skits from voluntary male students from the university's campus.
- △ The activity is enhanced by lighting, staging, and costumes in a theatrical presentation around a central theme.
- △ If the pageant winner is awarded a title, it also should not include the name of the Sorority nor should the winner be awarded any privileges of a sorority member.
- △ The Sorority's financial rules still apply when handling money for this activity (refer to Fiscal Officer's Manual).

D. Expelled Member Letter (See Appendix A-6)

E. Funeral - Memorial Policy

Notice/Policy Regarding the Usage of Symbols with Funeral Products

Notice to all vendors, businesses and services associated with the funeral/final arrangement/memorial business. (Including but not limited to funeral homes and final preparation businesses, casket/urn/vault manufacturers, grave marker manufacturers and funeral/memorial print materials.)

Delta Sigma Theta Sorority, Incorporated owns all intellectual property (trademarks, service marks, and copyrights -- collectively "marks") related to it, which includes all iterations of its name; any Delta logo – e.g., the Pyramid and Greek letters, symbols, word(s) or phrase(s) commonly associated with, and understood to refer to, Delta; and the "look" of any mark used to distinguish merchandise and service as being associated with or related to Delta, including its color combination and year of founding.

The use of the crest, symbols and Greek letters **are not approved or appropriate** for the lining in a casket, on a tombstone, a grave marker, an urn, vault or on a funeral program or in an obituary section of the newspaper.

Federal and state law protects Delta Sigma Theta Sorority, Inc.'s right to the exclusive use of its marks. The organization vigorously protects its intellectual property, including instituting legal action to protect its rights where that is necessary. The remedy to such actions could include legal action for willfully misusing Delta's marks.

At time of death it is the preference of Delta Sigma Theta Sorority, Inc. that all sorors have a will or provision that states all Delta Sigma Theta Sorority, Inc. governing documents, administrative resources, tools and paraphernalia be returned to (1) the chapter performing the Omega Omega Service, (2) the chapter of her choice, (3) a close and trusted soror, or (4) sent to National Headquarters. Please provide written instructions to family members not to sell anything on E-bay or any other social media or Internet site, or to donate Delta Sigma Theta Sorority, Incorporated governing documents, administrative resources, tools or paraphernalia to local charities.

F. Guidelines for Collegiate Chapter Anniversaries and Reunions

- △ Chapter sponsored anniversaries and/or reunions can only be organized by active collegiate chapters.
- △ The participation of former chapter members shall be by invitation only and shall be on a limited basis.
- △ If former members desire to have line reunions or desire to be involved in chapter anniversaries, they should contact the chapter president for further instructions and guidance.
- △ Involvement of the collegiate chapter advisor or advisory committee is required and all members must adhere to college/university guidelines.

The planning and organizing of collegiate chapter anniversaries and reunions shall be the responsibility of the collegiate chapter.

The planning and organizing of collegiate chapter anniversaries and reunions shall include but are not limited to the following activities/tasks:

- △ Advertisements
- △ Attire
- △ Chapter representation
- △ Correspondence

- △ Disposition of unused funds
- △ Event location
- △ Insurance
- △ Participation in campus events or with other organizations
- △ Programs/agendas
- △ Registration and collection of anniversary/reunion fees
- △ Step show participation
- △ Themes and logos

The chapter president can appoint a committee that includes former chapter members to assist with the planning of anniversaries and/or reunions, however, **all committees must be chaired by and remain the responsibility of the collegiate chapter.**

- △ ***For Chapter sponsored events, the chapter is responsible for:***
 - All planning and organizing of the event, including chairing committees, signing contracts, collecting money, etc. The event will be publicized with the chapter's name (XXX Chapter of Delta Sigma Theta Sorority, Inc. is sponsoring a 25th Reunion).
- △ ***When the chapter is not sponsoring the event, the following guidelines should be followed:***
 - The chapter members are not involved in the planning or organizing of these events. Other individual(s) are responsible for all activities and costs associated with sponsoring the event.
 - The event shall **not** carry the chapter's name or be advertised as a Delta Sigma Theta Sorority, Inc. event.
 - Acceptable language to distinguish the group's activity from the collegiate chapters' activity is: "Sorors initiated through XXX Chapter are sponsoring an anniversary celebrating 50 years of service."
 - Any and all documentation including but not limited to correspondence, invitations and publicity shall reference "initiated through XXX" as the host.

G. HONORARY MEMBERS – CHAPTER AFFILIATION

Membership Category – Honorary Member

- △ An Honorary Member is a soror who has distinguished herself by making an extraordinary contribution in her field. Her accomplishments have resulted in a significant impact on the national or global community.
- △ As an Honorary Member she shall have all privileges of membership except those of voting and holding elected office.

*The expectation is that Honorary Members remain **members-at-large**, rather than hold membership in a local alumnae chapter as their status as an Honorary Member is considered a **SPECIAL** category.*

Honorary Members are welcome to work with chapters and become familiar with their programs and initiatives.

It is acceptable and encouraged that they attend chapter events and regional activities such as cluster meetings and retreats so that they learn more about our illustrious Sorority.

H. Perpetrators Letter (See Appendix A-12)

I. Policy Statement on Wearing Your Letters/Symbols

Delta Sigma Theta Sorority, Incorporated is committed to advocacy for social action issues consistent with its mission and goals.

In an era of public demonstrations and social media, members of Delta Sigma Theta Sorority, Incorporated are urged to be prudent and to use good judgment in deciding when it is appropriate to wear and/or display Delta's symbols.

At all times, participants must protect Delta's image, history, culture, and sense of dignity.

J. Probation Policy – Chapters/Members

A probationary period should be viewed as a time for reflection and correction. Probation allows the chapter, member or soror to remain viable but with limitations. The probationary period for a chapter, member or soror should include but is not limited to conducting and/or participating in required programs and service projects as mandated by Delta Sigma Theta Sorority, Incorporated, completion of a prescribed DID plan and most importantly refrain from doing any illegal activities.

The amount of time a chapter or member/soror is placed on probation is outlined in the Code of Conduct. A normal timeframe for a probation could range from six months to a one year with a fine up to \$500.

However, if a member/soror or chapter does not fulfill the conditions of the probation or engages in any additional illegal activities, the chapter, member or soror will be sanctioned based on the findings by the Regional Director.

Probationary Plan

The probationary period should be specific to each chapter or member/soror based on the violation. Therefore, the Regional Director will develop a probationary plan for a chapter, member or soror. A copy of the Probationary Plan must be emailed to the chapter president and advisor (if applicable), if it is a chapter probation. If an individual member or soror probation, **each** member or soror must receive an email with the probationary plan (see below), with a copy to the chapter president (if applicable) and advisor (if applicable). A copy of each plan must be emailed to the following: National First Vice President, Regional Representative, Regional Member of National Scholarship and Standards, and National Headquarters - Membership Department.

The plan should include, but is not limited to, the following:

- △ DIDs to address the violation
- △ Mandatory DID on the Code of Conduct
- △ Payment of fines or damages (if applicable)

Delta Internal Development (DID) Workshops can include, but is not limited to:

- △ Chapter Management
- △ Conflict Resolution
- △ Fiscal Management
- △ Policies and Procedures
- △ Program, Planning and Development
- △ Protocol and Traditions
- △ Ritual and Ceremonies
- △ Team Building

During the probationary period, neither the member, soror or the chapter, or any of its members who have been disciplined, shall participate in activities of the sorority except those rehabilitative activities and/or activities approved by the Regional Director.

NOTE: Member is defined as any soror who pays dues to a chapter and to Grand Chapter, or who pays a member-at-large fee, or those exempt from payment of Grand Chapter dues and fees as stated in Article X – DUES AND FEES, Section 13. A soror is a woman who has been duly initiated into the Sorority.

The types of activities in which a chapter and its members **may be approved**, at the discretion of the Regional Director, to participate in during the probationary period are:

- △ Conducting chapter meetings and executive board meetings
- △ Participating and conducting chapter programs and service projects
- △ Preparing and submitting regional or national reports and audits
- △ Transacting any financial business for the purpose of conducting chapter business
- △ Attending statewide meetings and be seated at a regional conference and national convention
- △ University mandated activities e.g., Day of Service (**Collegiate**)
- △ Chapter members may wear paraphernalia

The types of activities in which a chapter or any of its members **may not** be permitted to participate in during the probationary period are:

- △ Chapter sponsored/organized social activities (e.g. parties, step or stroll shows/competitions, etc.)
- △ This includes but is not limited to programs, step shows, stroll offs and events held by the chapter, other organizations, university or any NPHC activity (exception- unless mandated, in writing, by the university)
- △ Conduct membership intake

The types of activities in which an individual member **may be approved**, at the discretion of the Regional Director, to participate in during the probationary period are:

- △ Attend chapter meetings
- △ Attend chapter programs and service projects
- △ Remain on the chapter internal email lists
- △ Attend statewide meetings, regional conference and national convention
- △ Wear paraphernalia

The types of activities in which an individual member **may not** be permitted to participate during the probationary period are:

- △ Hold office, appointed or elected, including for membership intake. If the member currently holds an office or position, it must be relinquished
- △ Attend Executive Board meetings or committee meetings
- △ Chair any committee of the chapter or serve on any chapter committee
- △ Represent the chapter or the organization. This includes programs, step shows, stroll offs and events held by the chapter, organization, university or any NPHC activity
- △ Participate in chapter program planning or any behind the scene planning

- △ Participate in any aspects of membership intake except attend Induction, Initiation, Sisterhood Banquet (if invited) and New Initiate Presentation

The types of activities in which an individual soror **may be approved**, at the discretion of the Regional Director, to participate in during the probationary period are:

- △ Wearing paraphernalia
- △ Attend chapter programs and service projects that are public events
- △ Remain on the chapter external roster

The types of activities in which an individual soror **may not be** permitted to participate during the probationary period are:

- △ Attend chapter meetings
- △ Attend chapter programs and service projects unless a public program
- △ Remain on the chapter internal email lists
- △ Attend statewide meetings, regional conference and national convention
- △ Hold office, appointed or elected, including for membership intake
- △ Attend Executive Board meetings or committee meetings
- △ Chair any committee of the chapter or serve on any chapter committee
- △ Represent the chapter or the organization. This includes programs, step shows, stroll offs and events held by the chapter, organization, university or any NPHC activity
- △ Participate in chapter program planning or any behind the scene planning
- △ Participate in any aspects of membership intake except attend Induction, Initiation, Sisterhood Banquet (if invited) and New Initiate Presentation

To be reinstated, a chapter, member or soror on probation must satisfy all financial obligations imposed as a result of the probation as well as successfully completing a tailored probationary plan, over a prescribed period of time. The probationary plan shall be developed and supervised by the Regional Director and/or her assigned designee.

If a chapter, member or soror does not successfully complete the probationary plan and/or commits any new violations, the chapter, member or soror will be sanctioned based on the findings by the Regional Director.

K. Selection/Election of Other Delta Related Representatives/Awardees

Selection/Election of Delta Related Representatives

The selection/election process for other Delta related representatives to attend Delta Days at the Nation's Capital, Delta Days at the UN, Regional meetings, and/or State meetings/clusters **must be included in the chapter's Rules of Order Form and Policies and Procedures.**

- △ The Nominating Committee must be involved in this process—even if the nominations are from the floor, and
- △ The Nominating Committee's involvement must be outlined in the Chapter's Policies and Procedures.
- △ An Elections Committee must be appointed during the process of selecting/electing other Delta related representatives. The role of the Elections Committee is to prepare, distribute and collect the ballot, tally the votes, and give the elections report.

Selection/Election of Delta Related Award Recipients

The selection/election process of chapter members for awards also must be conducted through the Nominating Committee. These awards may include, but are not limited to:

- △ Delta DEAR of the Year
- △ Soror of the Year
- △ Committee Chair of the Year

This selection/election process also must be outlined in the Chapter's Rules of Order Form and Policies and Procedures and must include the Nominating Committee receiving nominations—even if the nominations are from the floor, and the Elections Committee tallying the votes.

L. Solicitation of Funds Policy for Deltas and Non-Deltas

A soror/member is prohibited from raising funds for personal gain through any public solicitation, including but not limited to:

- △ Internet
- △ Emails
- △ Postal mail
- △ Crowd-fundraising websites (e.g. GoFundMe, Kickstarter, and Indiegogo); and
- △ Public promotion

A soror/member is prohibited from utilizing the intellectual properties of Delta Sigma Theta Sorority, Incorporated for, but not limited to:

- △ Payment of dues

- △ Clusters
- △ Regional Conferences
- △ National Conventions; and/or
- △ Any other official sorority gathering.

M. PROPER SOLICITATION OF FUNDS MANAGED THROUGH THE CHAPTER

The proper solicitation of funds managed through the chapter, for example, include: requests for funds to attend Delta functions in order to benefit the entire chapter's involvement in the activity. The solicitation shall be managed by the chapter president and/or her designee through official chapter communication to other chapters, businesses, and/or organizations.

Please refer to the Delta Internet Guidelines for further information

CROWD FUNDING

- △ It is permissible to use crowd funding accounts to publicize and collect money for chapter events. However, the funds must be deposited into a chapter account.
- △ Crowd funding pages with Delta symbols and graphics cannot be used for the benefit of individual sorors. Individuals cannot use a crowd funding account to raise funds for membership intake fees. Sorors cannot use crowd funding accounts to raise money for registration fees to attend clusters, conferences or conventions.
- △ Parents of participants can use crowd funding accounts to raise funds from family members and friends in support of their child's participation in cotillions and beautillions, but they must be reviewed by the chapter president prior to launch.

A non-Delta is restricted from raising funds through any form of solicitation, including but not limited to: Internet, emails, postal mail, and fundraising websites in order for that non-Delta to gain membership into Delta Sigma Theta Sorority, Incorporated.

N. Step Show Participant Guidelines for Deltas and Non-Deltas

GENERAL GUIDELINES

Delta Sigma Theta Sorority, Incorporated, recognizes that artistic and musical entertainment includes, but is not limited to:

- △ step/stomp shows,
- △ stroll-offs,
- △ strolls/struts,
- △ exhibition shows and/or
- △ other affiliated demonstrations (hereafter known as "shows")

Step Shows are creative and unique forms of expression, especially at the collegiate level. At most colleges and universities, students who are members of Greek-letter fraternities and sororities participate in such forms of entertainment as a means to promote and enhance the image of their respective fraternal organization and to showcase the talent of their membership.

- △ Shows provide students, parents, faculty members, college and university officials, and the public a forum to better understand the unique culture (e.g., history and traditions) of African American fraternities and sororities.
- △ Although shows enhance the sorority experience, they should not involve the degradation and/or belittlement of any other Greek-letter organizations, including fraternities and sororities affiliated with the National Pan Hellenic Council (NPHC), National Association of Latino Fraternal Organizations, National Inter-Fraternity Conference, and the National Pan Hellenic Conference.
- △ Shows which take the form of dancing, singing, and/or skits should not be performed using lewd, indecent, or obscene behavior.
- △ Delta Sigma Theta Sorority, Incorporated, requires chapters to portray positive themes when developing shows. When skits are performed, they should be developed to convey positive political, social justice, and moral messages.

SPECIFIC GUIDELINES

All show participants must at all times conduct themselves in a manner that would uphold the values and visions of the Founders of Delta Sigma Theta Sorority, Incorporated; bring honor and not any harm to Delta Sigma Theta's reputation and goodwill or in any way bring shame or dishonor, or bring disrepute to the organization. In any show (this includes shows sponsored by chapters or otherwise), participants shall not engage in any conduct or use any language that is obscene, offensive, or immoral or that would reflect negatively upon Delta Sigma Theta Sorority, Inc. Prohibited conduct includes, but is not limited to, the following:

- △ Nudity
- △ Partial nudity including exposed midriffs, buttocks, and large portions of the back.
- △ Gyrating or simulating sexual activity, or sexually suggestive movements.
- △ Profanity, including any word, expression, gesture or other social behavior that is socially construed or interpreted as insulting, rude, vulgar, desecrating or disrespectful in any manner.
- △ Using any music and/or videos that are in poor taste and that contain sexual connotations or profanity or verbal disrespect to women.
- △ Wearing attire that is unprofessional, distasteful, too tight, or masculine (e.g. combat/military boots).

In addition to adhering to the above guidelines, participants are expected to strictly follow the standards delineated in the Constitution and Bylaws, the Code of Conduct, and the Protocol and Traditions Manual of Delta Sigma Theta Sorority, Inc. (collectively noted to be "Delta Rules").

Participants shall adhere to the following Step Show Rules:

1. **Status of Participants:** No member shall be allowed to participate in any show unless she is in good standing with Delta Sigma Theta Sorority, Inc., including being financial, and having the appropriate academic standing.
2. **Compliance with Delta's Rules:** No member shall be allowed to participate in any show unless she adheres to these step show guidelines and the standards delineated in the Rules.
3. **Official Sorority Pin:** No participant shall wear the official sorority pin while participating in any show.
4. **Sounds and Calls:** No participant shall at any time use any sounds/calls (e.g., ooo-ooop) that purport to be a Delta sound or call, or use any unofficial symbols (e.g., elephant, duck).
5. **Use of Founders Picture:** No picture of the Founders shall ever be used without the prior written approval of the National President of Delta Sigma Theta Sorority, Incorporated.
6. **Use of Greek Letters:** The Greek letters "Delta Sigma Theta" should always be of equal proportion. They should not be distorted.
7. **Use of Delta's Trademarks:** No Delta trademarks, including any form of Delta's name, its Greek symbols, or any other symbol, shall be used on any body part in any way (e.g. branding, tattooing, head shaving, or related body markings) in any show. Thus, any person displaying any such marks shall not be allowed to participate in any show.
8. **Use of Images Associated with Delta:** The elephant and duck are not official symbols of Delta and should not be used with official symbols, with Delta's name, or in any public activity (including any show).
9. **No Degrading Use:** No Delta trademarks or service marks, including any form of Delta's name, its Greek symbols, or any other symbol, shall be used on alcoholic beverage(s) or tobacco containers in any television segment, video, DVD, or other medium where tobacco or alcoholic beverages are served, used, or referenced (assuming Delta has authorized any show participants or teams to participate in any event that will be televised or preserved on video or DVD other than for internal use by Delta) in relationship to a "themed" performance.
10. **Delta's Customs and Traditions:** The official colors of the Sorority are crimson and cream. Red and white are the only acceptable substitutes. The colors for the crest are crimson and cream or red and white. Yellow and gold are not appropriate substitutes for cream.

11. **Respect for Other Organizations:** No participant shall belittle other Greek letter organizations by using demeaning slogans, by wearing their colors, or in any other way. To do so is indicative of a lack of respect for Delta as well as for the other organization.

Any violation to these guidelines shall be dealt with through the disciplinary process of Delta Sigma Theta Sorority, Incorporated.

Step Show - Fundraising Event

Participating in a Step Show

- △ The parameters around the chapter's participation in a show should be detailed in the chapter's policies and procedures.
- △ At a minimum, the chapter must approve the participation in each show competition.

***Step teams represent the chapter.
The step team is a committee within the chapter.***

- △ For each event the committee should submit a budget that includes revenue and all allowable expenses that will be paid by the chapter.
 - Purchasing clothing is an unallowable expense that should not be charged to the chapter.
 - Some examples of allowable expenses include:
 - Registration Fee
 - Props
 - Music (Tapes)
 - Smoke Machine
 - Rented clothing used as costumes for step team participants
 - Travel Cost (If allowed)

All prize money (winnings) should be deposited in the chapter's operating account.

- △ Prize money is not to be split between step show participants.
- △ The proceeds may be used to support the chapter's programs and to defray the chapter's administrative expenses.

When a collegiate chapter participates in a competition, the collegiate advisor is required to accompany the team to the competition.

- △ The collegiate chapters shall provide the following when an advisor has to travel to shows:
 - Overnight travel: economy lodging and travel expenses

- Weekend travel: economy lodging, travel expenses and meals not to exceed \$42/day

Hosting a Step Show

As is the case with all fundraisers, a budget must be prepared for the event. Begin by listing the anticipated expenses.

- △ Some typical expenses are listed below:
 - Facility or equipment rental and related expenses
 - Liability Insurance
 - Printing of flyers
 - Postage
 - Trophies
 - Prize Money
 - DJ and/or MC

- △ Once the expenses are detailed, set the registration fee and determine how many participants will be needed for the event to be profitable.

- △ If you have indicated that the net proceeds will be used for scholarships and public services, the net proceeds must be utilized in that manner.

- △ Approximately 5-15% may be retained as start-up money to host the next year's fundraising event.

P. TRANSGENDER MEMBERSHIP POLICY

Executive Summary

Since our founding in 1913, Delta Sigma Theta Sorority, Inc. vision has been to provide generations of promising, high-achieving women with an outstanding sorority life experience that will impact the communities in which we serve and lead. Our Mission continues to be an organization of college educated women committed to the constructive development of its members and to public service with a primary focus on the Black community and remains vital and powerful today perhaps more so than ever.

In furtherance of our mission, tradition and values as a women's organization, and in recognition of our changing world and evolving understanding of gender identity, Delta Sigma Theta Sorority, Inc. will implement the following transgender policies as it relates to transgender individuals who live and consistently identify as women, regardless of the gender assigned to them at birth. Delta Sigma Theta Sorority, Inc. will also continue to use gendered language that reflects our identity as

a women's organization, and every aspect of Delta Sigma Theta Sorority, Inc., will be, designed and implemented to serve women.

Three policies were approved by the National Executive Board during the Spring 2017 National Executive Board meeting to address the categories of potential applicants, candidates, and pyramids, new members and existing members of Delta Sigma Theta Sorority, Inc.; participants in Delta Sigma Theta Sorority, Inc. youth Initiatives, and applicants for gender specific scholarships provided by Delta Sigma Theta Sorority, Inc.; and volunteers (who are not members of Delta Sigma Theta Sorority, Inc.) for youth initiatives of Delta Sigma Theta Sorority, Inc.

Transgender Policies

Policy I

Potential Applicants, Candidates, Pyramids, New Members) as well as current members of Delta Sigma Theta Sorority, Inc.

Delta Sigma Theta Sorority, Inc. will consider for membership (including potential applicants, candidates, pyramids, new and existing members) any female; any individual who self identifies as female, regardless of "her" assigned sex at birth, who lives and consistently identifies as a woman

Policy II

Youth Initiatives and Gender Specific Scholarships

Delta Sigma Theta Sorority, Inc. will consider for youth initiatives and gender specific scholarships any fe(male), any individual who self identifies as fe(male), regardless of her/his assigned sex at birth, or her/his expression, or the perceived expression of her/his gender for fe(male) Delta Sigma Theta Sorority, Inc. youth initiatives and fe(male) gender specific scholarships

Policy III

Youth Initiative Volunteers (who are not members of Delta Sigma Theta Sorority, Inc.)

Delta Sigma Theta Sorority, Inc. volunteers for youth initiative (who are not members of Delta Sigma Theta Sorority, Inc.), should be cisgender individuals only.

FAQ

Is Delta Sigma Theta Sorority, Inc. still a women's organization?

Yes, Delta Sigma Theta Sorority, Inc., remains an organization of college educated women committed to the constructive development of its members and to public service with a primary focus on the Black community, in every aspect.

Are Trans women eligible for membership in Delta Sigma Theta Sorority, Inc.?

Individuals who were assigned male at birth but live and consistently self-identify as women are eligible for membership. Acceptance as a Candidate for Membership is still based on chapter vote and approval of the Regional Director.

Are Trans men eligible for membership or to retain membership in Delta Sigma Theta Sorority, Inc.? Individuals who were assigned female at birth but self-identify as men are not eligible for membership or to continue to be members of Delta Sigma Theta Sorority, Inc.

What does it mean to live and consistently identify as a woman?

An applicant/candidate/pyramid/member must self-identify as a woman and all materials (inclusive of application materials) must support and verify this self-identification.

Under this new policy, what is required of applicants to be considered for membership?

Delta Sigma Theta Sorority, Inc. policy is one of self-identification. To be considered for membership, an applicant must select “female/woman” on the membership application and all supporting documentation must support this self-identification. Applicants must meet all requirements for membership as outlined in the Administrative Procedures for Membership Intake and procedural manuals approved by the Executive Board and must be approved for membership by majority vote of the members of the chapter through which she is to be initiated.

How were the opinions of the membership taken into consideration in making this decision?

In our commitment to a review process that was both deliberative and inclusive, The Membership Intake Special Operations Advisory Council to the National President (2014-2017) held focus groups, and town hall meetings with the membership. Consulted experts and conducted research in the relevant areas of the topic. Sought input from members, sorors, individuals and groups within the Delta community. Read, reviewed and researched relevant materials from the media and organizations similar to Delta Sigma Theta Sorority, Inc.

When will Delta Sigma Theta Sorority, Inc. begin implementation of the Transgender Membership Policy?

The policy approved by the National Executive during the Spring 2017 National Executive Board meeting and affirmed and ratified by the Grand Chapter in session during the 53rd National Convention became effective August 10, 2017 and thereafter.

SECTION IX

NOMINATIONS AND ELECTIONS



NOMINATIONS AND ELECTIONS

Each year the National Scholarship and Standards Committee facilitates a Nominations and Elections webinar for Chapters because they recognize the importance of nominations and elections on the local chapter level. The goal of the webinar is to:

- △ Assist chapters in understanding the nominating and elections process;
- △ Assist chapters in understanding the roles and responsibilities of the Nominating Committee Chair and Committee Members;
- △ Assist chapters in understanding the Nominating Committee is an elected standing committee, and the limitations of tenure for its members
- △ Assist chapters in understanding the roles and responsibilities of the Elections Committee Chair and Members;
- △ Assist chapters in understanding the Elections Committee is an Appointed Special Committee
- △ Answer questions chapter presidents and Nominating Chairs/Committee Members may have regarding the nominating process;
- △ Provide chapters with a Sample Nominating Process Timeline;
- △ Provide chapters with a Sample Elections Process Timeline;
- △ Assist chapters in understanding the eligibility criteria for members running for office
- △ Provide chapters with information on campaigning, and violations to the nominating and/or elections process

Chapter presidents, chairs and members of the Nominating Committee and the Elections Committee, as well as chapter members, may go to the national website, Members Only Portal, and click on the National Area, Scholarship and Standards Committee, to view and/or listen to the entire Nominations and Elections webinar. The PowerPoint includes the facilitator's note pages.

Please know that after each of the National Scholarship and Standards Committee's Nominations and Elections webinars, the questions members raised were incorporated into the presentation, so that the questions are being answered.

Delta Sigma Theta Sorority, Incorporated Members Only Portal

<https://members.dstonline.org>

SECTION X

CHAPTER SERVICE AREA

Procedures for Establishing/Revising Chapter Service Area

Per the Sorority's governing documents, chapters are expected to implement programs from the Sorority's Five-Point Programmatic Thrust in their local area (hereafter known as "service area") consistent with the National Programs of the Sorority.

The service area of a chapter is where the primary focus of chapter programs and projects should be. When there is an identified need for service outside of the chapter's service area, which crosses into an existing chapter(s) service area, a letter of agreement or Memorandum of Understanding (MOU) should be developed with the chapters involved. If the identified need is in a non-served area, the chapter may conduct the project/program; however, the chapter is encouraged to add the area to their official service area. Once an accepted policy/guidance (MOU) is adopted, if there is a violation of the agreement, the chapter could be subject to disciplinary action.

- △ A chapter's service area is identified by the Chapter Charter or source documentation provided from National Headquarters, National Scholarship and Standards Committee and/or the Regional Director. Source documentation could include, but is not limited to the Chapter Rules of Order Form or documented approval from the Chair of the National Scholarship and Standards Committee verifying service area revisions.
- △ The service area for a collegiate chapter is the location of the college or university as well as the university community. For Citywide/Core Chapters that could include more than one institution in that geographical area. Collegiate chapters should also ensure they are abiding by college/university rules as it relates to their limitations on conducting programs and/or fundraisers beyond their authorized service area.

Chapters may revise their chapter service area based on the following reasons:

- △ To revise current defined service area(s)
- △ To address overlapping service areas
- △ To obtain or relinquish underutilized service area(s)

1. REVISE CURRENT SERVICE AREA:

In order to revise their service area, chapters **MUST follow the following steps:**

STEP ONE: ADD or DELETE areas currently identified as service area:

- △ The chapter president appoints an ad hoc committee to review chapter programming to decide if a service area should be added or deleted.
- △ Identify area(s) that the chapter actively serves.

- △ If the chapter wishes to add a service area, confer with National Headquarters, Membership Department, to verify if the service area in question is not listed on another local chapter(s) charter.
- △ If there are areas identified as being shared with another chapter, follow steps outlined in the **Overlapping Service Area section**.
- △ Committee makes recommendation to the Executive Board.
- △ Committee presents chapter service area change(s) recommendation to the chapter.
- △ Chapter votes on recommended chapter service area(s) changes.

STEP TWO: CONFIRM and DOCUMENT

- △ Chapter submits letter of request to “revise chapter service area” and appropriate supporting documentation to Regional Director detailing all revisions.
- △ Areas shall be counties and/or cities, if the entire county is not served; or areas within the city and/or county designated by specific boundaries.
- △ Supporting documentation includes but is not limited to maps of geographic area, impact on community, minutes from meeting where revised service area was approved.

STEP THREE: FINALIZATION

- △ The Regional Director shall submit all documentation received from the chapter to the National First Vice President, Chair of the National Scholarship and Standards Committee and the Regional Member of the Scholarship and Standards Committee, with a copy to National Headquarters.
- △ The National Scholarship and Standards Committee will review for approval. Once approved, National Headquarters will be notified.
- △ National Headquarters will send the chapter correspondence to confirm the revised chapter service area and retain a copy for their records.
- △ The chapter will update all documents (Rules of Order Form and Chapter Policies and Procedures) and distribute both to chapter members.

Please note: When considering expanding and revising a chapter's service area, the proposed service area shall not impact other chapter (s) service areas or violate any existing agreements.

2. OVERLAPPING SERVICE AREAS:

In the event two or more chapters' service areas overlap, the following steps **MUST be followed:**

STEP ONE:

- △ Chapter president or her designee(s) from each chapter with shared service area(s) shall schedule a meeting along with the State Coordinator and/or the Regional Scholarship and Standards Committee member to discuss and agree to the terms of the Memorandum of Understanding (MOU).
- △ At this meeting, the two or more chapters must bring maps of the geographic area, proof of demonstrated chapter programming in stated service areas which include chapter minutes from the past four years and any other additional documentation.

STEP TWO:

- △ A Memorandum of Understanding (MOU) **must** include but is not limited to the following areas: outline of the defined service areas, membership intake, youth initiatives, scholarships, and fundraisers.

STEP THREE:

- △ If a MOU cannot be agreed upon for the overlapping service area(s), the chapters will be deemed out of compliance.
- △ Once the content and terms of the MOU have been agreed upon with approval from the Regional Director, each MOU must be presented to their respective chapters' Executive Board for information only, then to their respective chapter membership for discussion and chapter vote.
- △ Once chapter approves, the MOU must be signed by all chapter presidents.

STEP FOUR:

- △ The approved and signed MOU, all supporting documentation (i.e. maps of geographic area, impact on community, etc.), and minutes from meeting when MOU was approved shall be scanned and emailed to the Regional Director by one of the chapter presidents (she will copy the other chapter president(s) on the email information being sent).

STEP FIVE:

- △ If the Regional Director agrees with the recommendation, she signs the MOU and submits the packet of information to the National First Vice President, Chair of the National Scholarship and Standards Committee, the Regional Member of the Scholarship and Standards Committee, with a copy to National Headquarters.
- △ The National Scholarship and Standards Committee will review the submitted packet for approval. Once approved, National Headquarters will be notified.
- △ National Headquarters will send the chapter correspondence to confirm the revised chapter service area and retain a copy for their records.
- △ The chapter will update all documents (Rules of Order Form and Chapter Policies and Procedures) and distribute both to chapter members.

3. UNDERUTILIZED SERVICE AREA

A service area which is governed by a local chapter's charter and is underutilized by said chapter, may forfeit their right to service that geographical area if another local chapter petitions the Regional Director to secure that underutilized geographical area.

An underutilized service area is one that is on a chapter's charter; however, the geographical area is not being serviced (programs not being implemented to benefit the community).

In order to obtain or relinquish an underutilized service area, the following steps **MUST be followed:**

STEP ONE:

- △ Confer with National Headquarters, Membership Department or the Regional Director to verify if the service area in question is listed on the local chapter(s) charter.

STEP TWO:

- △ Contact the Regional Director to seek approval to initiate the process to obtain or relinquish underutilized service area. **Please note:** Supporting documentation (i.e. maps of geographic area, impact on community, etc.) **will** be required by the Regional Director to justify that the service area is underutilized.

STEP THREE:

- △ The Regional Director will contact all impacted chapters, in writing, to inform them of the chapter's intent to obtain or relinquish the underutilized geographical area listed on the local chapter(s) charter.
- △ This step may initiate discussions with the local chapter(s) to obtain or relinquish the underutilized service area **OR** chapter(s) may start discussion to create a MOU to share the underutilized service areas.

STEP FOUR:

- △ If an MOU is required, follow the steps under the **Overlapping Service Area** section.

STEP FIVE:

- △ The chapter decides whether to obtain or relinquish the underutilized service area.
- △ Recommended chapter service area change(s) presented to the Executive Board.
- △ Recommended chapter service area change(s) presented to the chapter.
- △ Chapter votes on recommended chapter service area(s) changes.
- △ Chapter submits letter of request to “revise chapter service area” and minutes from meeting when revised service area was approved to Regional Director detailing all revisions.
- △ The Regional Director submits all documentation to the National First Vice President and Chair of the National Scholarship and Standards Committee. The National Scholarship and Standards Committee reviews the documentation for approval. Once approved, National Headquarters will be notified. National Headquarters sends the chapter correspondence to confirm the revised chapter service area and National Headquarters retains a copy for their records. The chapter updates all documents (Rules of Order Form and Chapter Policies and Procedures) and distributes both to chapter members.

Fundraising Within Shared Service Areas

When chapters plan fundraising events that are held within a shared service area or outside of their local service area, the chapter planning the fundraising event **shall** inform the other chapter with whom they share the service area, or whose service area it is. Chapters are encouraged to work cohesively when these instances occur. The chapter planning the event **shall** send a written notice to the other chapter and a copy to the Regional Director.

The choice of an out-of-area venue may be made under the following circumstances:

- △ venues within the chapter's service area are not large enough to accommodate the chapter's event; or
- △ venues within the chapter's service area are not appropriate for the caliber of the proposed chapter's event.

In addition, chapters that have long-standing events/activities such as cotillions, Jabberwock, dinner dances, crab feasts, fashion shows, etc., and have established partnerships, attendees, etc., at venues outside their service area shall alert the chapter the same as above: a written notice to the other chapter and a copy to the Regional Director.

As always, please direct questions or concerns to the Regional Director.

SERVICE AREA: COLLEGIATE CHAPTERS

A collegiate chapter may be established as a campus-based chapter, a city-wide chapter or a core chapter and shall be composed of collegiate members as defined in the *Constitution and Bylaws, 2017 Edition* ARTICLE II – MEMBERSHIP, Section 5. REQUIREMENTS FOR MEMBERSHIP IN CHAPTERS. Once established, a collegiate chapter with fewer than seven members must request and receive special dispensation to function in any given sorority year. The Regional Director shall inform the Scholarship and Standards Committee. (*Constitution and Bylaws, 2017 Edition* Article III- Chapters, Section 1, A.)

Campus-Based

A campus-based chapter may be established at an accredited four-year college or university approved by the Scholarship and Standards Committee. The chapter shall consist of a minimum of seven women meeting the requirements of collegiate membership. The Service Area of a campus-based chapter is the campus on which the chapter is located, and the immediate surrounding community.

City-Wide and Core Collegiate Chapters

City-wide Chapter – A *city-wide* chapter is not based or seated on a particular campus, but it is comprised of members from more than one college/university located in a particular area.

- △ A *city-wide* chapter **seat** (Presidency) can be moved to any of the schools that are listed on the chapter charter and service area of the *city-wide* chapter
- △ All of the colleges/universities on the *city-wide* chapter charter and the service area must provide letters of consent and agreement

Core Chapter – is located (**seated**) on a particular campus but may accept members from other colleges/universities by a pre-approved agreement by the affected colleges/universities and approved by the Regional Director. This means that all of the colleges and universities are listed on the chapter Charter and service area, and that all of the colleges and universities must consent and provide letters of agreement to Delta Sigma Theta Sorority, Incorporated. These letters of agreement are sent to the Regional Director and she then forwards them to the National First Vice President, who is the Chair of the Scholarship and Standards Committee.

- △ A *core chapter* **should** be able to stand alone and remain viable and active without other colleges or universities.
- △ In a *core chapter* **the seat** (Presidency) remains at the college/university where the campus based chapter was chartered.

College and University Letters of Support/Recognition/Acknowledgement

In the case of City-wide and Core chapters, institutions must have on record, a letter of support acknowledging Delta Sigma Theta Sorority, Incorporated as a recognized student organization on the campus.

- △ Each Regional Director must receive a letter of support confirming the institution's support or lack thereof for the City-wide or Core Chapter functioning on the institution's campus.

The National Scholarship and Standards Committee acknowledge that sometimes there are special circumstances that warrant approval to function on a specific campus. These instances must be reviewed by the Regional Director and approved by the National Scholarship and Standards Committee.

BI-STATE SERVICE AREA POLICY

Chapters may be approved to operate in a bi-state service area and provide services and programs in cities located in more than one state that are in the same region provided they meet **ALL** of the following criteria:

- △ The cities are defined as twin cities **and** are located in the defined Metropolitan Statistical Area (MSA) as defined by the United States Census Bureau as one or more contiguous counties based on a set of demographic-economic criteria and/or the local government has some other defined Interlocal Cooperation Act (ICA) which regulate organizations that do business and provide services in both states and between the two cities;
- △ The cities must be in the same region;
- △ The next nearest chapter in the region is located 40 or more miles away;
- △ The chapter has provided documentation of ongoing programs and services they have provided for both cities for the past five years, inclusive of letters of support from agencies served; and
- △ The chapter's policies and procedures include the following for the chapter president's role: Review and monitor state laws and policies in both states and ensure the chapter follows state laws and policies in both states.

SECTION XI

LEADERSHIP

CHAPTER LEADERSHIP

“Good leaders create followers, but great leaders create other leaders.”

In order to be effective, the chapter leadership needs to work together to strike a balance between conducting the business of Delta Sigma Theta Sorority, Inc., while simultaneously enhancing our beloved sisterhood. To achieve this, chapter leadership should know and understand the programs, policies, procedures, and organizational relationships of the Sorority. Chapter leadership has a responsibility individually and collectively, as well as with the chapter members and Grand Chapter for coordinating, directing and controlling the chapter's programs.

- △ **Coordinating** is relating and integrating the work of the various committees of the chapter.
- △ **Directing** is seeing that the work is carried out.
- △ **Controlling** is seeing that it is carried out according to the established policies and procedures of the chapter.

Chapter leadership is charged with the task of achieving desired goals through the cooperative efforts of chapter members. Chapter leadership is effective when they possess leadership ability to inspire members to work together in the achievement of a common objective on behalf of the Sorority.

DESIRED QUALITIES OF CHAPTER LEADERS

- △ **Willingness to Accept Responsibility**
- △ **Responsiveness to People**
- △ **Friendliness**
- △ **Intelligence**
- △ **Enthusiasm**
- △ **Courage**
- △ **Objectivity**
- △ **Initiative**
- △ **Energy**
- △ **Vision**
- △ **Decisiveness**
- △ **Honesty**

Definition of Leadership

What is your definition of leadership and what does leadership mean to you? Every Delta wants to be a good leader; however, do you as a Delta leader know what leadership really is?

Unfortunately, there is no one-size-fits-all definition for leadership. We all have our own ideas about what it means to be a good leader. Some of us think leadership means guiding others to complete a particular task, while others believe it means motivating the members of your team to be their best selves. But while the definitions may vary, the general sentiments remain the same: leaders are people who know how to achieve goals and inspire people along the way.

Visit our National Website in the Members Only Portal to view the Leadership Academy Interviews with Past National Presidents.

Delta Leadership Competencies

Competencies describe what it takes to be successful when performing a certain job or role. The Delta Leadership Competencies describe what it takes to play a leadership role successfully in Delta Sigma Theta Sorority, Inc. In our Sorority, it is not just the local chapter, regional, and national officers who are expected to act as leaders, every member has some leadership role to play. The Delta Leadership Competencies can help you better understand what skills, abilities, and behaviors are most appropriate for Delta leaders.

As you review the Delta Leadership Competencies, do not worry if you are not strong in all eleven areas. No one is. The goal is to understand in what areas you need to be strong and then, develop your skills and abilities in those areas.

VISIONING

Ability to create a compelling vision of the future at the national, regional, state, and/or chapter levels.

STRATEGIC AGILITY

Ability to translate the vision into clear, specific, measurable strategies and objectives that sorors can understand and accomplish.

ETHICS AND VALUES

Ability to display behavior consistent with the Sorority's Nine Cardinal Virtues and Jewels.

LEADING OTHERS

Ability to motivate and inspire sorors to accomplish the business of the Sorority while maintaining a sense of sisterhood.

COMMUNICATION

Ability to interact effectively in one-on-one and group meetings, in written form, and during presentations.

INTERPERSONAL SAVVY

The ability to interact effectively with a wide range of people (sorors and others) in a variety of settings.

BUSINESS AND FINANCIAL ACUMEN

Ability to understand and appropriately manage Delta's policies, practices, and procedures – both administrative and financial.

PLANNING AND ORGANIZING

Ability to set priorities and manage the Sorority's activities to focus on the most critical issues.

PROBLEM SOLVING AND DECISION MAKING

Ability to solve problems and make timely, high-quality decisions.

POLITICAL AND ORGANIZATIONAL SAVVY

Ability to understand how the Sorority really works at the chapter, state, regional, and national levels – particularly how power, authority, and resources are allocated.

PERSONAL AND PROFESSIONAL DEVELOPMENT

Ability to use the activities of the Sorority to continue to learn and grow both on a personal and professional level.

Leadership vs. Management

Leadership refers to an individual's ability to influence, motivate, and enable others to contribute toward organizational success. Management consists of controlling a group to accomplish a goal. Influence and inspiration separate leaders from managers, not power and control.

The main difference between leaders and managers is that people follow leaders, and people work for managers. A successful chapter president needs to be both a strong leader and manager in order to get their chapter members to buy into their vision and follow them to success. As a chapter president, you must be a leader who motivates people to understand and believe in your vision and to work with you to achieve your goals. As a chapter president, you also are a manager who must be focused on administering and making sure the day-to-day operations of the chapter are taking place.

In order for you to engage your chapter members in providing the best service to your community and to implement Delta's programs, you must involve them in your vision and align their

perceptions and behaviors with the Sorority's vision. You need to get your members excited enough to view your vision as their dream. With smaller chapters, the challenge lies in making sure you are both leading your team as well as managing your day-to-day operations.

Leadership and management must go hand in hand. They are not the same thing, but they are necessarily linked, and complementary. The leader's job is to inspire and motivate. The manager's job is to plan, organize, and coordinate.

Leaders vs. Managers

Below is a summary chart showing a comparison of the behaviors exhibited by leaders and managers. Many people lead and manage at the same time and will display a combination of behaviors.¹

Descriptor	Leader	Manager
Essence	Change	Stability
Focus	Leading people	Managing work
Has	Followers	Subordinates
Seeks	Vision	Objectives
Detail	Inspire	Instruct
Power	Apply influence	Wields authority
Appeals to	Heart	Head
Energy	Passion	Control
Dynamic	Proactive	Reactive
Persuasion	Empower	Control
Style	Transformational	Transactional
Exchange	Excitement for work	Money for work
Risk	Takes risks	Minimizes risks
Descriptor	Leader	Manager
Rules	Breaks rules	Makes rules

¹ Changingminds.org

Conflict	Uses conflict	Avoids conflict
Direction	New roads	Existing roads
Blame	Takes blame	Blames others

Managers have subordinates. Leaders have followers. Circle the descriptors that best describe you. Where do you fit? How would your chapter members describe you?

Time Management²

Time management is the ability to plan and control how you spend the hours in your day to effectively accomplish your goals. As a chapter president it is essential that you utilize time management skills effectively. With the numerous responsibilities, many constituents (e.g. other officers, chapter members, other Delta leaders, other organizations, the public) and multiple communication channels (emails, texts, telephone calls, in-person meetings), fulfilling your duties can seem like a full-time job. Coupled with your other life responsibilities, it can all seem overwhelming. Skills involved in managing your time include planning for the future, setting goals, prioritizing tasks, and monitoring where your time actually goes.

Planning is an important aspect of time management. You must actively plan your day rather than letting it happen in response to others' needs and demands. Planning involves:

- △ Setting long-range goals and listing objectives linked to the goals.
- △ Establishing priorities according to the goals and objectives based on their importance.
- △ Understanding your personal energy cycle and using it to guide you to set up your day.
- △ Using goals and priorities to create your plan for your day.

Here are some tips for effective time management:

1. **Create a daily plan.** The plan gives you a good overview of how the day will pan out; that way, you don't get caught off guard. Your job for the day is to stick to the plan as best as possible.
2. **Peg a time limit to each task.** Be clear that you need to finish tasks in specified time periods. This prevents the effort from dragging on and eating into time reserved for other activities.
3. **Use a calendar.** Having a calendar is the most fundamental step to managing your daily activities. It's even better if you can sync it to your mobile phone and other hardware you use – that way, you can access your schedule no matter where you are.

² The Time Trap: The Classic Book on Time Management – Alec MacKenzie
 “20 Quick Tips for Better Time Management” – Celestine Chua

4. **Use an organizer.** The organizer helps you to be on top of everything in your life. It's your central tool to organize information, to-do lists, projects, and other miscellaneous items.
5. **Know your deadlines.** When do you need to finish your tasks? Mark the deadlines out clearly in your calendar and organizer so you know when you need to finish them.
6. **Learn to say "No."** Don't take on more than you can handle. For the distractions that come in when you're doing other things, give a firm "no"; or, defer it to a later period.
7. **Target to be early.** When you target to be on time, you will either be on time or late. Most of the time, you will be late. However, if you target to be early, you will most likely be on time. For appointments, strive to be early. For your deadlines, submit them earlier than required.
8. **Time box your activities.** This means restricting your tasks to X amount of time.
9. **Have a clock visibly placed before you.** Sometimes we are so engrossed in our work that we lose track of time. Having a huge clock in front of you will keep you aware of the time.
10. **Set reminders 15 minutes ahead.** Most calendars have a reminder function. If you have an important meeting to attend, set that alarm 15 minutes ahead of the time to attend.
11. **Focus.** Are you multi-tasking so much that you are just not getting anything done? If so, focus on just one key task at one time. Close off all the applications you aren't using. Close off the tabs in your browser that are taking away your attention. Focus solely on what you're doing. You will be more efficient that way.
12. **Block out distractions.** What's distracting you from the task at hand? Messenger? Phone ringing? Text messages popping up? Identify time periods where you will limit distractions, especially if the task requires focus and concentration.
13. **Track your time spent.** Use a timer to be aware of the time spent.
14. **Don't fuss about unimportant details.** You will never get everything done in **exactly** the way you want. Trying to do so is being ineffective.
15. **Prioritize.** Since you can't do everything, especially at one time, learn to prioritize the important items. Apply the 80/20 principle which is a key principle in prioritization.
16. **Delegate.** If there are things that can be better done by others or things that are not so important, consider delegating. This takes a load off you, and you can focus on the important tasks.
17. **Batch similar tasks together.** For related work, batch tasks together. For example, allot time slots to make calls or return emails. It streamlines the process.
18. **Eliminate your time wasters.** What takes your time away from the task at hand? Facebook? Twitter? Instagram? Email? Stop checking them so often.
19. **Cut off when you need to.** Don't be afraid to interrupt in meetings or draw a line to cut-off. Otherwise, there's never going to be an end and you'll just eat into the time for later.
20. **Leave buffer time in-between.** Don't pack everything closely together. Leave a 5-10-minute buffer time in between each task. This helps you wrap up the previous task and start on the next one.

Management Tips

A successful balance of leadership skills and management techniques is essential to how effective you will be in handling the chapter business of Delta Sigma Theta Sorority, Inc.

- △ Organize your working space so that everything is accessible and convenient; secure all forms, files and handbooks, and purchase equipment such as a printer, files, filing cabinets, and office supplies as needed.

(NOTE: Back-up records on a thumb drive or an external hard drive at least weekly, if not daily.)

- △ If the chapter does not have one, establish a chapter Post Office Box and email account. **DO NOT USE YOUR WORK EMAIL ADDRESS for chapter business.** Answer your mail (both United States Postal Service and email) on a daily basis. If your time does not permit daily answering, give priority to those that need an immediate response. Answer letters and emails within five days of receipt. Mail should be handled only once - read and answer immediately. Set up email folders for specific topics such as: Chapter Meeting Agendas and Notes; Chapter Minutes (General Body and Executive); Chapter Correspondence; Regional Correspondence; National Correspondence; Membership Intake, etc.
- △ Establish a chapter telephone number that may or may not include a fax line, especially if you have others in your household who use your telephone. Let chapter members and the Regional Director know which number is the best one to use to reach you.
- △ Make certain that if your email, telephone, or mailing address changes, you quickly change it with National Headquarters, the Regional Director, and your chapter members.
- △ Establish a conference call number to be used strictly for chapter and/or Delta business.
- △ Keep a notebook or online file for each chapter mailing sent by National Headquarters. To manage effectively and set a good example for all involved, **you must read** the contents of each mailing, and stay up-to-date on all information issued by National Headquarters. Some information may require some type of action or distribution to chapter members.
- △ Keep a notebook or online file for each Scholarship and Standards “*Hot off the Press.*” The information provided in these communications is critical and you must be prepared for any questions that arise from chapter members. In addition, you want to share this information with your chapter members.
- △ Tab your *Constitution and Bylaws* for easy referencing. Keep copies in various locations for easy access, and always have a copy with you when traveling.

- △ Keep a copy of *Robert's Rules of Order, Newly Revised* with your *Constitution and Bylaws*; tab sections of *Robert's Rules of Order, Newly Revised* that usually generate the most questions for you as the chapter president; (e.g. majority vote, nominations; elections; quorum; how to accept motions; how to handle subsidiary motions such as: amendments, limiting debate, postpone, etc.)
- △ Know how to keep the meeting on track through the use of motions; ruling non-germane discussion out of order; starting the meeting on time, and ending on time; being courteous and yet firm; and, owning what you do not know and then taking the time to learn before proceeding.
- △ Keep and tab your chapter's policies and procedures. **Read and be familiar with them.**
- △ Make certain you maintain a budget book for the funds you expend as chapter president, so that you may be reimbursed in accordance with your chapter's fiscal policies and procedures. Also, keep copies of receipts for all reimbursements that you request.
- △ Plan your personal agenda for each general body and executive board meeting. Know which reports will need motions. Have general knowledge of the issues that each report may bring; be prepared to answer questions from the membership.
- △ Use your resources – human and material – do not simply appoint those whom you think are friendly to your administration or your friends, use the best member for the position based on her skills and talents. If you have active past presidents or National/Regional officers or elected/appointed officers, committee chairs/members in the chapter, use them as resources, if and when appropriate. They are a valuable resource.

CHAPTER OFFICERS AND MEMBERS: HOW TO MANAGE CONFLICT

One of the most important and challenging roles of the chapter president will involve managing difficult situations and personalities to accomplish the programming goals of the chapter. Every chapter president will, at some time during her tenure, experience conflict.

In most situations, interpersonal conflict among members and non-members lead to disciplinary action issues. Knowing the difference between managing conflicts versus exercising the Code of Conduct is key to productive interpersonal relationship in local chapters. The Code of Conduct is a document that governs (and manages) the conduct of the members of the Sorority. When a member is referred to the regional/national officers for disciplinary matters, areas of the Code of Conduct are cited. However, there are times when some matters need not be escalated to the Code of Conduct or even warrant disciplinary actions.

Taken directly from Richard Cohen's, "Students Resolving Conflict Mediation in Schools," the following is stated: "Even when the conflict comes to the attention of the system, the focus is primarily on the disciplinary offense and not on the interpersonal dimension of a conflict." (p37)

There will be many issues that arise. Here are two examples of sources of conflict within chapter and among members:

Relationship

This includes areas that involve but are not limited to: differences in values, goals, experiences, unexpressed or unmet expectations, unresolved prior concerns, role incompatibility, and lack of trust.

Reported in the form of: verbal disagreements, written disagreements (via email etc.), bullying, intimidation and harassment of members, boycotting and/or encouraging nonsupport of chapter/sorority programming.

Organizational

This includes areas that involve but are not limited to: change, power structure/struggles, limited resources, lack of information, faulty communications, stressful conditions, competing desires, ineffective processes, conflicting goals and objectives, poor communication.

Reported in the form of: lack of respect or intimidation of chapter officers, ineffective chapter officers and dereliction of duties.

Resolving Conflict

In order to manage and resolve conflict in a constructive and respectful manner, we need to employ the skills of:

- △ Assertive Communication
- △ Negotiation Skills and Process
- △ Mediation Skills and Process

Assertive Communication

This resolution method involves the ability to honestly express your opinions, feelings, attitudes, and rights, without undue anxiety, in a way that doesn't infringe on the rights of others.

Negotiation

Negotiation is a discussion between two or more individuals who are trying to work out a mutually satisfactory solution to their problem. Negotiations typically take place because the parties wish to resolve a problem or dispute between them. When parties negotiate, they usually expect give and take. Win-win negotiation is the best approach. It stresses common interests and goals.

Mediation

Mediation is a process in which a neutral third-party assists in resolving a dispute between two or more other parties. It is a non-adversarial approach to conflict resolution.

Remember, in order for the conflict resolution process to be successful, it must reflect the organization's values and be modeled and followed by all parties involved in the organization. Once all steps in the conflict resolution process have been exhausted and there is no resolution, the determination can be made that the situation may need to be referred to a sorority regional/national officer for disciplinary actions.

SECTION XII MEMBERSHIP



DEFINITIONS

WHAT IS MEMBERSHIP IN DELTA SIGMA THETA SORORITY, INCORPORATED?

Membership in Delta Sigma Theta Sorority, Incorporated is...

- △ a privilege and
- △ an honor
- △ members
- △ pledge to uphold
- △ for a lifetime

A MEMBER IS MORE THAN A SOROR!

A **soror** is a woman who has been duly initiated into the Sorority.

A **member** of Delta Sigma Theta Sorority, Incorporated is any soror who pays her dues to a chapter and to Grand Chapter, or who pays a member-at-large fee, or those exempt from payment of Grand Chapter dues and fees.

- △ A member is involved in that she has paid her dues.
- △ A member is engaged in the life of the Sorority.
- △ A member is financial by definition therefore to use the word financial before the word member is redundant.

ENTITLEMENTS

THE ENTITLEMENTS FOR SORORS

1. The **Omega Omega** Service
 - a. The financial status of the soror at the time of her death is **not** an issue for this entitlement.
 - b. The Omega Omega Service is a **one-time tribute** that all chapters owe their deceased sorors.

- c. Only the Omega Omega Service is the soror's right; courtesies extended are optional.
 - d. If a soror retires and/or moves to another chapter location, the Omega Omega Service should be conducted by the chapter president in the area where the soror lived, as specified in the soror's will or by family request.
 - e. If an Omega Omega Service has been held, a Memorial Service or a graveside service may be held by the sorors of another chapter.
 - f. If there is a question concerning the deceased soror's membership, National Headquarters should be contacted to verify the deceased soror's membership.
2. A **soror** is entitled to wear paraphernalia.
 3. A **soror**, who is a bride or being recognized on another noteworthy occasion, may be serenaded with the Sweetheart Song.
 4. A **soror** may attend chapter meetings as a visitor.
 - a. In order to be admitted to the meetings, the soror must bring her membership card to verify that she is a soror; or make prior arrangements with the chapter's financial secretary/team to verify her membership through headquarters records and,
 - b. if requested, sign-in as a visitor.
 5. A **soror** may **not vote** at chapter meetings until she pays her local chapter and Grand Chapter dues, and the payment has been cleared by National Headquarters staff, at which time the **soror** becomes a member.
 6. A **soror** may **not** attend or lead committee meetings.
 7. A **soror** may attend Delta Sigma Theta Sorority, Inc. public events and fundraisers, and of course, if applicable, pay the required admittance charge.
 8. A **soror** may volunteer in public events where the general public is allowed to serve as volunteers. She must be Risk Management trained where deemed necessary.
 9. Sanctioned **sorors** in attendance when the Sweetheart Song is sung, cannot participate.

THE ENTITLEMENTS FOR MEMBERS

Members have **all** rights and privileges of membership including:

- △ All of the rights and privileges of being a soror
- △ Voting
- △ Serving in elected and appointed office(s).

MEMBER-AT-LARGE ENTITLEMENTS

- △ Alumnae members at large and collegiate members at large do not have the right and privilege of voting or serving in elected positions.
- △ Alumnae members at large may not attend or lead committee meetings.
- △ Alumnae members at large and collegiate members at large may serve in appointed positions at the regional and national level.
- △ Alumnae members at large may serve as collegiate chapter advisors.
- △ Alumnae members at large and collegiate members at large have the entitlement of sorors.

MEMBERSHIP CATEGORIES

Alumnae * Collegiate

Alumnae Member at Large * Collegiate Member at Large

ALUMNAE MEMBER – is a soror who has paid dues to an alumnae chapter and is not matriculating at a college or university in a program leading to an initial baccalaureate degree. If the soror has not completed her initial baccalaureate degree and has returned to an educational institution to complete requirements for said degree, she has the option of joining the collegiate chapter, provided she has not paid dues to an alumnae chapter.

COLLEGIATE MEMBER – is a soror who has paid dues to a collegiate chapter, and who is matriculating at a college or university pursuing work leading to an initial baccalaureate degree.

ALUMNAE MEMBER AT LARGE - is an alumnae soror who elects to affiliate only with Grand Chapter by paying her dues through Grand Chapter.

May	May Not
Visit alumnae chapter activities and meetings	Host chapter meetings, chapter events/parties/community service activities
Wear the Sorority letters (Delta Sigma Theta)	Participate in Step Shows/Stroll Offs
Pay dues to Grand Chapter	Wear anything with chapter Greek Letters or identification of a suspended chapter
Attend state meetings, regional conference and national conventions	Stroll at homecomings/parties/events, etc. on a campus where the chapter is not functioning
Attend Ritualistic Ceremonies	Vote at chapter meetings

COLLEGIATE MEMBER AT LARGE – is a soror who may elect to affiliate only with Grand Chapter by paying her dues through Grand Chapter.

To be eligible for collegiate member-at-large membership, a soror also must maintain a cumulative grade point average of 2.75 on a 4.0 scale or a 1.75 on a 3.0 scale **and** be enrolled at a college or university where the **chapter** has been retired or suspended; or the college or university has terminated its support/contract with the Sorority; or she has transferred to an institution where there is not a chapter.

May	May Not
Visit alumnae and collegiate chapter activities and meetings – where permissible by the university	Operate as a chapter (i.e., host chapter meetings, chapter events/parties/community service activities)
Wear the Sorority letters (Delta Sigma Theta)	Participate in Step Shows/Stroll Offs
Pay dues to Grand Chapter	Wear anything with chapter Greek Letters or Identification of a suspended chapter.
Attend state meetings, regional conference and national conventions	Stroll at homecomings/parties/events, etc. on a campus where the chapter is not functioning
Attend Ritualistic Ceremonies	Vote at chapter meetings
Report grades (electronic transcript) to Regional Director and Regional Representative at conclusion of each semester	Host on-campus Delta events/reunions

LIFE MEMBERSHIPS

1. A **Life Member** is a soror who has paid in full a Life Membership fee prior to 1963.
2. A **Golden Life Member** is a soror who has paid in full one of two specified Golden Life Membership fees.
3. A **Diamond Life Member** is a soror who has paid in full the specified Diamond Life Membership fee.

STEPS SORORS MUST TAKE TO TRANSFER/TRANSITION MEMBERSHIP FROM ONE CHAPTER TO ANOTHER

In order to transfer/transition membership from one chapter to another, the following steps must be taken to ensure the process is completed:

1. The chapter to which the soror is transferring must verify her membership in the Sorority; this can be done by the soror completing the Verification of Membership Form;
2. The soror pays the new local chapter's dues; and
3. The soror pays Grand Chapter dues, or verifies her payment of Grand Chapter dues through her previous chapter.

Please Note: In some chapters, the local dues of graduating collegiate sorors are waived if the graduating collegiate soror joins the alumnae chapter within the first year of her graduation. Graduating collegiate sorors should inquire if the alumnae chapter's policies and procedures includes a provision that local dues are waived for graduating collegiate sorors.

ROLES AND RESPONSIBILITIES OF A CHAPTER MEMBER

Every **member** of the chapter should be involved actively in some capacity during the fiscal year. During the meetings **members** should conduct themselves in a manner consistent with the Sorority's Nine Cardinal Virtues; and, in a responsible and respectful manner as they receive the reports of officers and committees.

During chapter meetings, members should:

- △ Address all questions and comments to the presiding officer/chapter president.
- △ Make constructive suggestions that lead to a solution to the problem.

Every **member** of Delta Sigma Theta Sorority, Inc. is expected to make a productive contribution to the life and welfare of the chapter by:

- △ Being loyal to Delta Sigma Theta Sorority, Inc. and to its officers;
- △ Attending meetings regularly;
- △ Paying dues promptly;
- △ Making herself available, and being willing to serve;
- △ Participating in and supporting chapter programs and activities;
- △ Focusing on the purpose of the discussion or activity;
- △ Requesting clarity, if additional data is needed to make an informed decision;
- △ Respecting the rights of others and being fair to all;
- △ Respecting differences of opinions; differing without bitterness; and, agreeing to disagree; and
- △ Understanding her own limitations, and having compassion for the limitations of others.

RENOUNCEMENT OF MEMBERSHIP

Renouncing one's membership in Delta Sigma Theta Sorority, Incorporated is by choice and should be entered into with all sincerity and humility.

The **soror/member** wishing to terminate her membership must formally convey this intent to Grand Chapter.

Acceptance of the soror/member's renouncement of membership **shall not be reversed, nor shall the soror/member be eligible for membership intake again.**

For purposes of this policy, **RENOUNCE** shall have the following definition:

- △ To announce formally the termination of membership.

STEPS TO BE TAKEN BY THE SOROR/MEMBER DESIRING TO RENOUNCE HER MEMBERSHIP

1. Forward a formal written letter of renouncement with original signature to National Headquarters: Attention Membership Department. Correspondence shall note the following:
 - a. Current Name
 - b. Address, Phone Number and Email Address
 - c. Name at Initiation
 - d. Date of Initiation
 - e. Chapter of Initiation
 - f. Membership Number
2. Forward the following publications and other items to National Headquarters under separate cover at the same time the Withdrawal of Membership Form is submitted:
 - a. Doctrine (*Ritual*, Pyramid Study Guide, Membership Intake Program)
 - b. Membership Certificate and Card
 - c. Protocol and Traditions Manual
 - d. Chapter Management Handbook
 - e. *Constitution and Bylaws*
3. Give ALL paraphernalia to any current member of the Sorority; or deliver it to a local Delta Sigma Theta Sorority, Incorporated chapter; or send it to National Headquarters, Attention: Membership Department for distribution.

STEPS TO BE TAKEN BY NATIONAL HEADQUARTERS, REGIONAL DIRECTOR, AND NATIONAL SCHOLARSHIP AND STANDARDS COMMITTEE

The Membership Department will email the **Regional Director** for the region in which the soror/member resides to inform her of the intent to renounce membership. The Regional Director, or her designee, shall then contact the soror/member via telephone to discuss the reason for her renouncement of membership; explain the severity of her decision; and, make sure that it is understood that **once the notarized Withdrawal of Membership Form is received the decision is irreversible and she cannot reapply.**

The Regional Director will provide the soror/member the **Withdrawal of Membership Form**, giving the soror/member thirty days to sign and return the notarized form to National Headquarters, Attention: Membership Department. Receipt of the signed and notarized **Withdrawal of Membership Form** shall serve as confirmation of the soror/member's request.

Once the Membership Department has received the form it shall be placed in the appropriate file at National Headquarters. The renounced soror/member's file shall be flagged noting the date of renouncement; and a copy, for file purposes, shall be sent to the **Chair, National Scholarship and Standards Committee, Regional Director, soror/member and the local chapter president (if applicable)**. Additionally, this action shall cease all correspondence (emails, newsletters, publications, etc.) to the soror/member.

The **Information Systems Department** shall remove ALL access the renounced soror/member had to the **Members Only Area** of the national website; **Sisters Only Member Portal**; and, if appropriate, the **Red Zone**.

If the renounced member has paid national and local dues for the year in which she renounced her membership, she shall forfeit said national and local dues and shall not be entitled to a refund or return of any dues payment.

STEPS TO BE TAKEN BY LOCAL CHAPTER

If the renounced member was involved with a local chapter during the year of her renouncement, the chapter president shall:

1. Remove the renounced member's name, contact information, and member number from the chapter's financial roster and chapter directory.
2. Have the chapter officers cease ALL correspondence (emails, newsletters, publications, social media accounts, etc.) to the renounced member; and,

3. Have chapter technology committee chair, corresponding secretary, and/or whoever manages the chapter website, remove the renounced member's access to the chapter's ***Members Only Area*** of its website.

MEMBERSHIP INTAKE

Information regarding Membership Intake is contained in three documents:

- △ Administrative Procedures for Membership Intake
- △ The Membership Intake Program
- △ The Pyramid Study Guide

These documents are updated frequently and can be found on the national website.

<https://members.dstonline.org/Membership-Intake/Membership-Intake-Documents>

SECTION XIII

CHAPTER PROGRAMMING

PROGRAM PLANNING AND DEVELOPMENT

Chapters of Delta Sigma Theta Sorority, Incorporated are expected to plan and must show evidence of programming that supports the Five-Point Programmatic Thrust of the Sorority:

- △ **Economic Development**
- △ **Educational Development**
- △ **International Awareness and Involvement**
- △ **Physical and Mental Health**
- △ **Political Awareness and Involvement**

Additionally, chapters may also incorporate programming in support of the two national commissions:

- △ **National Arts and Letters Commission**
- △ **National Social Action Commission** (programs in this area may also fall under the Political Awareness and Involvement point)

NOTE: Local chapters may utilize all of the same titles listed above as committee names. However, the usage of the word “commission” is reserved for committees on the national level only.

Each elected National President of the Sorority, has the opportunity to develop signature programming during her tenure in office. This signature programming is usually introduced to Grand Chapter shortly after election and implemented by the chapters thereafter.

Once a National President’s tenure of office is complete, as with all programming, the chapter should survey the needs of the community they serve to determine if the program(s) should continue. The ideal chapter in Delta Sigma Theta Sorority, Inc. keeps their programming relevant, current, accessible and closely in line with the national initiatives of the Sorority.

The following committee/commission strategies and plans can be found in the Members Only Portal on the National Website:
National Program Planning and Development
National Arts and Letters Commission
National Social Action Commission

SECTION XIV

DISCIPLINE AND REHABILITATION



INFORMATION SHEET FOR CHAPTERS/SORORS/MEMBERS UNDER CEASE AND DESIST

What is Cease and Desist?

A written directive issued by the Regional Director/National President/Chair, National Scholarship and Standards as a reaction to a reported allegation that may be in violation of Delta's Code of Conduct.

What to expect while on Cease and Desist?

- △ Written notification from Regional Director/National President/Chair, National Scholarship and Standards regarding Cease and Desist.
- △ When the Regional Director/National President/Chair, National Scholarship and Standards has issued a Cease and Desist order to a chapter or soror, the chapter or soror must stop all Delta activities until the Cease and Desist order has been lifted, unless the Regional Director has approved participation in certain activities.
- △ Periodic updates on status of the investigation, if required.
- △ The investigation team to collect statements from involved parties.

The types of activities which a chapter or soror **may be approved** to participate in during Cease and Desist only at the discretion of the Regional Director/National President/Chair, National Scholarship and Standards are:

- △ DID or other Delta related training workshops.
- △ Regional conferences/national convention or other regional meetings to attend specifically designated sessions/workshops.
- △ Public service or fundraising events if the chapter has signed contracts which, if breached, would result in a significant monetary loss or damage to the chapter, or would damage Delta's reputation.
- △ University mandated activities i.e. Day of Service.

The types of activities which a chapter or soror **cannot** be permitted to participate in (not attend or assist in planning or implementing) during Cease and Desist are:

- △ Chapter seating as a voting or alternate delegate at a regional conference/national convention.
- △ Chapter meetings and/or functions, committee meetings, and executive board meetings.
- △ Membership Intake Process (preparation and/or actual process)
- △ Public service projects, chapter and/or jointly sponsored, representing Delta).
- △ Fundraising events in the name of the chapter.

- △ State/Cluster and local meetings such as Founders Day, chapter sponsored campus programs, forums and other Delta events not open to the general public.

The types of activities which a chapter or soror **will be required** to participate in during Cease and Desist are:

- △ Regional/National Officer directed training.
- △ Participation in the investigation process.

The chapter/soror can expect during the investigation:

- △ To receive a request to participate in the investigation (time and date will be provided).
- △ Written account of allegations from the Regional Director and explanation of next steps.
- △ To be asked not to discuss any events with any parties concerning the investigation (either before giving a statement or afterwards).
- △ To be asked to provide a written and verbal account of the incident(s) requiring the investigation.
- △ To be asked to sign a Witness Statement.
- △ Notification to the Collegiate/University official via the Allegation Report Form of incident(s) and pending organization investigation.

Until the investigation is complete and the Regional Director/National President/Chair, National Scholarship and Standards lifts the Cease and Desist, the chapter/soror will not function in Delta's name nor wear Delta paraphernalia or represent Delta and/or the chapter in any way, except as approved by the Regional Director/National President/Chair, National Scholarship and Standards.

At the completion of the Cease and Desist and depending on the outcome of the investigation, the chapter/soror can expect the following:

- △ To be cleared of any alleged code of conduct violations and permitted to begin functioning again;
- △ Sanctions levied against the involved parties;
- △ Rehabilitation plan developed by the Regional Director/National President/Chair, National Scholarship and Standards may be required.

Until the investigation is complete and the Regional Director or National President or Chair, National Scholarship and Standards Committee lifts the Cease and Desist, the chapter/member/soror will not function in Delta's name nor wear Delta paraphernalia or represent Delta and/or the chapter in any way, except as approved by the Regional Director or National President or Chair, National Scholarship and Standards Committee.

APPEALS PROCESS

The purpose of the appeals policy and procedures is to provide a framework within which grievances may be settled in a fair and expeditious manner. The appeals process is an administrative proceeding that is conducted in a manner to encourage a thorough development of the facts, through submissions by members and through Delta's independent investigation, and a thorough consideration of relevant facts at the conclusion of an investigation.

During the course of the deliberative process, additional violations of the Sorority's Code of Conduct or other governing documents may be discovered and could result in additional sanctions being imposed. Likewise, if the evidence does not substantiate the alleged violation(s), sanctions may be reduced or removed. Each appellate body – the National Scholarship and Standards Committee, the National Executive Board, and the Grand Chapter convened in Executive Session at the national convention – reserves the right to add or remove sanctions, as appropriate.

NOTE: Delta Sigma Theta Sorority, Incorporated shall not refund to any appellant any amount the appellant has paid in fines for sanctions prior to the disposition of appellant's appeal. Payment of fines constitutes an admission of an appellant's involvement in the conduct for which she has been charged, and the payment will be recorded accordingly.

Policy

Delta Sigma Theta Sorority, Incorporated provides an appeals process for individual members/sorors and chapters that have been charged with violating Delta's *Constitution and Bylaws* and its Code of Conduct. The type of decisions that individuals may appeal include, but are not limited to, expulsion, suspensions, probations, the imposition of fines, and impeachment. The types of decisions that chapters may appeal include, but are not limited to, charter revocation, suspensions, probations, and the imposition of fines. Delta's appeals process and procedures are available only to address violations of Delta's *Constitution and Bylaws* and its Code of Conduct. The appeals process and procedures are not intending to, and do not, address or substitute for sanctions or charges that a state and/or federal law enforcement agency may impose upon an appellant for violations of state and/or federal laws.

Appellants must pay all expenses associated with an appeal.

Appeals must be filed in the following order of hierarchy: National Scholarship and Standards Committee; National Executive Board; and the Executive Session of the national convention. While an appeal is pending at one level, the decision made at the lower level against the appellant by the elected/appointed official of Delta Sigma Theta Sorority, Incorporated will remain in effect until the body charged with reviewing and acting upon the appeal has rendered its decision.

Procedures

Level I – National Scholarship and Standards Committee

The appeal begins at this level. The Appeal should be forwarded to Delta Sigma Theta Sorority, Incorporated. Attn: National Scholarship and Standards Committee Appeal, Membership Department (*address provided at the end of this document*). **The appeal and all supporting evidence shall be filed within 45 days of receipt of the Disciplinary Action Form.** The receipt will be confirmed by delivery via United States Postal Service certified mail, return receipt requested. The Regional Director shall be notified of the receipt of the appeal. **New evidence is inadmissible after the Level I Appeal process.**

For the purpose of this policy "evidence" is any documentation that supports the proof or denial of an individual's and/or chapter's claim. Level I will be the only opportunity the Regional Director, individual and/or chapter can submit evidence.

- A. The Committee meets quarterly and will review an appellant's appeal during the Committee's first meeting after the appeal has been filed. The National First Vice President shall transmit in writing the decision of the National Scholarship and Standards Committee within 7 business days to the appellant with copies to the Regional Director, Regional Representative, National President, regional member of the National Scholarship and Standards Committee, chapter president (if applicable), Chapter Advisor (if applicable), University Officials (if applicable) and National Headquarters, Membership Department.
- B. When appeals are reviewed at Level I, the committee has the option to take the following actions:
 - △ Accept the Regional Director's decision and deny the appeal
 - △ Accept the Regional Director's decision and **amend** sanctions; and/or
 - △ Overturn the decision if the allegations are not substantiated
- C. In the event the appellant is dissatisfied with the decision of the National Scholarship and Standards Committee, the appellant may file the appeal at Level II with the National Executive Board.
- D. If the Regional Director's sanction is overturned or amended she will receive a detailed explanation why the appeal was not upheld.

Level II - National Executive Board

- A. If the **appellant** is not satisfied with the disposition of the appeal at Level I, she may request, through the National President, that the appeal be elevated to Level II, to the National Executive Board. Level II appeals should be forwarded to Delta Sigma Theta Sorority, Inc. Attn: National Executive Board Appeal, Membership Department (*address provided at the end of this document*). The appellant must file the Level II appeal within **30 days** of receipt of the National

Scholarship and Standards Committee Appeal Disposition. The receipt of the Appeal Disposition by appellant will be confirmed via United States Postal Service certified mail, return receipt requested. **New evidence is inadmissible at the Level II Appeal process.**

Note: If an Executive Board Member was part of the investigation team for a specific case, she will recuse herself from the appeal.

- B. Within 15 business days of receipt of the request for the Level II appeal, the National President shall notify in writing all members of the National Executive Board and shall appoint three board members to review the appeal at this level. **The Level II review team will review all documentation submitted from the Level I Appeal**, and render its decision in writing within 30 days of receipt. Appellants shall be notified in writing within 7 business days of the decision with copies to the Regional Director, Regional Representative, National First Vice President (if applicable), National President, members of the National Scholarship and Standards Committee, chapter president (if applicable), Chapter Advisor (if applicable), University Officials (if applicable) and National Headquarters, Membership Department.
- C. When appeals are reviewed at Level II, the committee has the option to take the following actions:
 - △ Accept the National Scholarship and Standards Committee decision and deny the appeal
 - △ Overturn the decision of the Regional Director if the allegations are not substantiated
- D. If the National Scholarship and Standards Committee and/or the Regional Director's ruling is overturned or amended, the committee and the Regional Director will receive a detailed explanation regarding the ruling.

Level III – Executive Session at the National Convention (Closed to National President, Voting Delegates, Level III Review Team and National Headquarters Staff Support)

If the appellant is not satisfied with the disposition from the Level II Appeal process, the appellant may request through the National President within 30 days of receipt of the Appeal Disposition to have the appeal considered at the next scheduled national convention. Receipt of Appeal Disposition by appellant will be confirmed via United States Postal Service certified mail, return receipt requested. Level III appeals should be forwarded to Delta Sigma Theta Sorority, Inc. Attn: Executive Session at the national convention Appeal, Membership Department (*address provided at the end of this document*).

- A. Prior to the first session of the national convention, the National President shall appoint five members to serve as the review team for the appeal. The review team shall review statements from all appeal levels, interview the appellant(s) and present findings to the voting delegates only in a closed session at the national convention. **New evidence is inadmissible at the Level III Appeal process, excluding personal testimony from the appellant.**

Note: ONLY the appellant can be present at the Level III Appeal.

- B. The appeal shall be resolved by majority vote or resolution of the voting delegates in executive session prior to last plenary session. A written copy of the disposition of the appeal shall be sent within 14 business days of the date of the executive session to the appellant(s) with copies to the Regional Director, Regional Representative, National First Vice President (if applicable), National President, members of the National Scholarship and Standards Committee, chapter president (if applicable), Chapter Advisor (if applicable), University Officials (if applicable), and National Headquarters, Membership Department.

The appellant must be present at the national convention for the appeal to be reviewed. Appellant must pay all expenses associated with an appeal.

- C. Members who have served on the review team at another level are ineligible to hear the appeal at this level.
- D. The decision of Grand Chapter is final.

Please submit all appeals to the following address:

Delta Sigma Theta Sorority, Incorporated
Attn: Membership Department
1707 New Hampshire Ave. NW
Washington, DC 20009

Probation and Rehabilitation Plans

A probationary period should be viewed as a time for reflection and correction. Probation allows the chapter, member or soror to remain viable but with limitations. The probationary period for a chapter, member or soror should include but is not limited to conducting and/or participating in required programs and service projects as mandated by Delta Sigma Theta Sorority, Incorporated, completion of a prescribed DID plan and most importantly refrain from doing any illegal activities.

The amount of time a chapter or member/soror is placed on probation is outlined in the Code of Conduct. A normal timeframe for a probation could range from six months to a one year with a fine up to \$500. However, if a member/soror or chapter does not fulfill the conditions of the probation or engages in any additional illegal activities, the chapter, member or soror will be sanctioned based on the findings by the Regional Director.

Probationary Plan

The probationary period should be specific to each chapter or member/soror based on the violation. Therefore, the Regional Director will develop a probationary plan for a chapter, member or soror. A copy of the Probationary Plan must be emailed to the chapter president and advisor (if applicable), if it is a chapter probation. If an individual member or soror probation, **each** member or soror must receive an email with the probationary plan (see below), with a copy to the chapter president (if applicable) and advisor (if applicable). A copy of each plan must be emailed to the following: National First Vice President, Regional Representative, Regional Member of National Scholarship and Standards Committee, and National Headquarters, Membership Department.

The plan should include, but is not limited to, the following:

- △ DIDs to address the violation
- △ Mandatory DID on the Code of Conduct
- △ Payment of fines or damages (if applicable)

Delta Internal Development (DID) Workshops can include, but are not limited to:

- △ Chapter Management
- △ Conflict Resolution
- △ Fiscal Management
- △ Policies and Procedures
- △ Program, Planning and Development
- △ Protocol and Traditions
- △ Ritual and Ceremonies
- △ Team Building

During the probationary period, neither the member, soror or the chapter, or any of its members who have been disciplined, shall participate in activities of the Sorority except those rehabilitative activities and/or activities approved by the Regional Director.

NOTE: Member is defined as any soror who pays dues to a chapter and to Grand Chapter, or who pays a member-at-large fee, or those exempt from payment of Grand Chapter dues and fees as stated in Article X – DUES AND FEES, Section 15. A soror is a woman who has been duly initiated into the Sorority.

The types of activities in which a chapter and its members **may be approved**, at the discretion of the Regional Director, to participate in during the probationary period are:

- △ Conducting chapter meetings and executive board meetings
- △ Participating and conducting chapter programs and service projects
- △ Preparing and submitting regional or national reports and audits
- △ Transacting any financial business for the purpose of conducting chapter business

- △ Attending statewide meetings and be seated at a regional conference and national convention
- △ University mandated activities e.g., Day of Service (**Collegiate**)
- △ Wearing paraphernalia

The types of activities in which a chapter or any of its members **may not** be permitted to participate in during the probationary period are:

- △ Chapter sponsored/organized social activities (e.g. parties, step or stroll shows/competitions, etc.)
- △ This includes but is not limited to programs, step shows, stroll offs and events held by the chapter, other organizations, University or any NPHC activity (exception- unless mandated, in writing, by the university)
- △ Conducting membership intake

The types of activities in which an individual member **may be approved**, at the discretion of the Regional Director, to participate in during the probationary period are:

- △ Attending chapter meetings
- △ Attending chapter programs and service projects
- △ Remain on the chapter internal email lists
- △ Attending statewide meetings, regional conference and national convention
- △ Wearing paraphernalia

The types of activities in which an individual member **may not** be permitted to participate during the probationary period are:

- △ Hold office, appointed or elected, including for membership intake. If the member currently holds an office or position, it must be relinquished
- △ Attend Executive Board meetings or committee meetings
- △ Chair any committee of the chapter or serve on any chapter committee
- △ Represent the chapter or the organization. This includes programs, step shows, stroll offs and events held by the chapter, organization, University or any NPHC activity
- △ Participate in chapter program planning or any behind the scene planning
- △ Participate in any aspects of membership intake except attend Induction, Initiation, Sisterhood Banquet (if invited) and New Initiate Presentation

The types of activities in which an individual soror **may be approved**, at the discretion of the Regional Director, to participate in during the probationary period are:

- △ Wearing paraphernalia
- △ Attending chapter programs and service projects that are public events
- △ Remain on chapter external roster

The types of activities in which an individual soror **may not be** permitted to participate during the probationary period are:

- △ Attending chapter meetings

- △ Attend chapter programs and service projects unless a public program
- △ Remain on the Chapter internal email lists
- △ Attend statewide meetings, regional conference and national convention
- △ Hold office, appointed or elected, including for membership intake
- △ Attending executive board meetings or committee meetings
- △ Chair any committee of the chapter or serve on any chapter committee
- △ Represent the chapter or the organization. This includes programs, step shows, stroll offs and events held by the chapter, organization, University or any NPHC activity
- △ Participate in chapter program planning or any behind the scene planning
- △ Participate in any aspects of membership intake except attend Induction, Initiation, Sisterhood Banquet (if invited) and New Initiate Presentation

To be reinstated, a chapter, member or soror on probation must satisfy all financial obligations imposed as a result of the probation as well as successfully completing a tailored probationary plan, over a prescribed period of time. The probationary plan shall be developed and supervised by the Regional Director and/or her assigned designee.

If a chapter, member or soror does not successfully complete the probationary plan and/or commits any new violations, the chapter, member or soror will be sanctioned based on the findings by the Regional Director.

SECTION XV

WORKING WITH NATIONAL HEADQUARTERS



***The National President is the Chief Executive Officer of
Delta Sigma Theta Sorority, Incorporated***

NATIONAL HEADQUARTERS STAFF

The National Headquarters staff is comprised of salaried professionals who:

- △ Implement the policies and procedures and actions of the Grand Chapter and Executive Board;
- △ Maintain the headquarters property and master files;
- △ Discharge a variety of program activities; and
- △ Support functions with the elected and appointed committees, commissions, task forces, councils and any other approved groups that emanate.

The staff is employed to execute the business of the Sorority. The day-to-day management of National Headquarters is under the direction of the Executive Director. The National Headquarters Staff members are assigned to the various committees, commissions and task forces to provide specific technical assistance, staff support and for purposes of continuity from the committee to its successor and other components of National Headquarters and chapters.

The staff is responsible for:

- △ Initiating program ideas;
- △ Implementing programs agreed upon by the Sorority; and
- △ Working with all national and regional leadership.

The Executive Director and staff members are delegated with responsibilities related to specific committees, and in this role, they participate in National Committee meetings. The Executive Staff members also meet with the National Executive Board.

The duties of the Headquarters staff are to:

- △ Coordinate the activities and programs of the Sorority;
- △ Work with committee chairpersons on their assignments as set forth in the Bylaws;
- △ Work with National Officers in their relationship to local chapters;
- △ Evaluate and make recommendations to the National Executive Board for improvement of Sorority structure and programs;
- △ Be responsible for the management and operation of the National Office;
- △ Ensure that the office routine, procedures and schedules are organized in such a manner as will assure effective administration;
- △ Work with the Housing and Properties Committee to recommend policies for the use and maintenance of the building and equipment, to ensure that the building is appropriately used and properly managed;
- △ Strengthen and keep alert to every opportunity for using the channels of the Sorority for the reclamation of members;
- △ Support the national convention/regional conferences as authorized by the National Executive Board;

- △ Be responsible for the media coverage and other publicity of the Sorority's purpose, objectives, policies and programs, to its members and the nation;
- △ Be responsible for the publication of the Delta Journal and Newsletter and such other publications as needed and approved;
- △ Administer the budget of the National Headquarters in line with approved financial policies and issue orders for disbursement of Grand Chapter funds;
- △ Submit in writing to the National Executive Board, reports on the work of the Sorority in pursuit of its objectives;
- △ Be responsible for ordering Sorority jewelry for members and keeping on file contracts with the jeweler;
- △ Facilitate effective representation of Delta Sigma Theta Sorority, Incorporated with other national organizations;
- △ Receive and deposit all funds sent to Grand Chapter and issue reports on same to the National President and National Treasurer;
- △ Serve as a clearing house and coordinator for all Delta activities; and
- △ Perform all other such duties as assigned by the Executive Director National President and CEO, and/or the National Executive Board.

EXECUTIVE OFFICE

This office provides overall executive direction and administration of headquarters operations, programs, services and support to all National Officers, Committees/Commissions, Task Forces and other groups in goal attainment. The Executive Director participates in planning, developing, implementing, coordinating, budgeting and monitoring all activities of the headquarters operation.

The Executive Office is led by the Executive Director and includes the Deputy Executive Director, Human Resources, the Special Assistant to the National President, the Executive Assistant to the National President and Executive Director and the Meeting Planners. This team provides staff support and technical assistance to the National President, Executive Committee, General Counsel, Nominating and Personnel Committees.

Human Resources is responsible for the organizational functions having to do with employees and the employment and labor laws governing them, their benefits and salary. These functions most often include: Talent Management, Total Rewards (Benefits and Compensation), Compliance and Employee Relations.

The Meeting Planning team provides support for regional conferences and national conventions specifically as well as the National Executive Board Meetings, National Committee Meetings, Delta Days at the Nation's Capital (DDNC), Delta Day at the United Nations (DDUN), national summits, symposiums and special events as approved by the Sorority: the research and recommendation of sites; contract negotiations; food and beverage selections/negotiations; coordination of all logistics, housing accommodations, room set ups, audio visual requirements, decorations, shuttle transportation, signage and conference/convention services.

In addition to planning the Sorority's events, the team is responsible for the maintenance of the meeting history to include the economic impact, room block/pick-up summary; and implements and updates the regional conference and national convention planning guides.

DEPARTMENTS

FACILITIES AND PROPERTY MANAGEMENT DEPARTMENT

The Facilities and Property Management Department is responsible for Headquarters' real estate properties. The buildings extend from 1703 -1711 New Hampshire Ave., NW in Washington, D.C. and are four stories high, and include a basement.

The department manages the day to day operations that deal with the maintenance and the secure working environment for the staff and visitors. The staff receives the hundreds of members and visitors who are touring the facilities or conducting business. This department manages and conducts emergency and safety evacuation of the Headquarters office when appropriate action is necessary. The Facilities and Property Management Department staff ensures that the facilities are in compliance with Federal and District of Columbia regulations. Ensures that the communication bridge from the membership and the appropriate person or department is facilitated in a timely manner.

Other duties of Facilities and Property Management include:

- △ Processing all mail and deliveries received via USPS, UPS, FedEx, etc., and distributing to the appropriate department;
- △ Ensuring that the staff has the appropriate office supplies to accomplish their daily tasks;
- △ Being responsible for the logistical coordination of office equipment, furniture and movement;
- △ Processing and shipping all orders received via the Delta Bookstore in the Sisters Only portal.
- △ Managing the Sorority's off-site storage facilities that house the inventory of publications, membership intake materials and historical artifacts.

The full time Archivist is responsible for the archival and preservation of Delta's holdings using current preservation procedures. Her role includes continuing to expand the archives with past and present artifacts that are donated for safe keeping and display, organizing and categorizing the holdings in the appropriate listing summary, according to Founders, National Presidents, National Officers, Regions, etc. She also provides assistance to chapters on the use of appropriate preservation methods.

The Facilities and Property Management Department provides staff support and technical assistance to the National Housing and Properties Committee and the National Heritage and Archives Committee.

FINANCE DEPARTMENT

This department is responsible for the financial affairs of the organization; the implementation of financial management policies and procedures; and activities which includes the maintenance of its fiscal records, property accounting, compliance with all federal, state, and local taxes, and the preparation of financial statements and reports.

The Finance Department is responsible for the implementation of the online processing and receipt of dues, chapter fees and regional conference and national convention registration fees. Included is the onsite management of the financial operations at regional conferences and national conventions. This department is responsible for the annual compilation and filing of the Annual Financial Report and Federal Income Tax Group Return Authorization form, the bonding and liability insurance data due from each chapter and assists the financial officers with the compilation and dissemination of all fiscal information to chapters.

This department receives, invests, reports and provides an accurate accounting for the funds of the Grand Chapter. It provides an accounting for cash receipts, cash payments and cash balances; disburses funds in accordance with the policies and procedures of the organization; conducts functions of internal audit and control; manages accounts payable and accounts receivable; monitors inventory levels; and collects fines levied.

The Finance Department provides staff support and technical assistance to the National Treasurer, Finance Committee and the Internal Audit Committee.

INTELLECTUAL PROPERTY DEPARTMENT

This department is responsible for managing Delta's legal interest and intellectual property/brand, which includes monetizing, protecting, monitoring and promoting Delta's brand.

The Intellectual Property Department is responsible for managing the licensing process for all certified vendors, negotiating and approving brand licensing, ensuring the satisfactory performance of all license obligations and identifying and resolving license violations. This includes, but is not limited to: preparing the application documents; having the documents posted to the website; taking all calls from interested vendors; sending the applications to the new vendors that request it or the renewal vendors who need to re-submit them; verifying that all documents are received and the application is complete; reviewing and approving Exhibitor conference marketing; vendor merchandise; preparing and transmitting license certificates; and updating the website to keep an accurate list of all certified vendors.

The Intellectual Property Department is responsible for maintaining ownership rights to and protecting Delta's brand. This includes, but is not limited to: identifying and protecting Delta's trade secrets, securing, maintaining and protecting Delta's ownership rights to each of its trademarks (Federal and common law) and copyrights, preventing unauthorized and/or damaging or disparaging use of any such trademarks and copyrights, preventing and resolving infringement of Delta's ownership rights, creating infringement deterrent

programs and compliance initiatives (i.e. creation of an e-commerce program), managing sponsor and partner co-branding usage of Delta's intellectual property, and identifying new intellectual property assets and obtaining the appropriate legal and commerce rights thereto.

This department is responsible for monitoring all use of Delta's brand. In layman's terms, this department is Delta's "protector." This includes, but is not limited to: providing Delta brand and intellectual property education to members and non-members; monitoring known social media sites for infringers of the trademark; monitoring online retailers such as Amazon, eBay and etsy for infringers; investigating calls that are received from members; non-members or vendors regarding possible infringers; investigating emails that are received from members; notifying non-members and vendors of possible infringers; supervising vendor practices at sanctioned events to ensure compliance and prevent unauthorized exploitation and use of Delta's brand; encouraging negotiations to promote compliance; and identifying egregious violations requiring litigation.

This department is also responsible for the planning and management of exhibit tradeshow at national conventions and regional conferences. The department is responsible for developing, implementing and executing processes with respect to but not limited to the:

- △ Pre-event and onsite registration, pre-event collection of all exhibitor fees;
- △ Satisfaction (and, ideally, exceeding) of revenue goals;
- △ Collaboration and coordination with the respective Convention Center Sr. Operations Manager, Security Team, et al and Freeman; onsite issue-resolution and event-optimization plans (including, but not limited to: exhibitor issues and requests (i.e. booth placement, additional needs/special accommodations; EMT issues; intra-exhibitor conflict resolution, registration/technology challenges, etc.);
- △ Identifying emergent resolution with respect to exhibitor move-in issues;
- △ Enforcing compliance with federal, state and municipal law;
- △ Providing National Headquarters support of strategic partnership committee/co-chairs with respect to corporate sponsor/strategic partner relationships and management of all pre-event requested and anticipated aspects (external-third party, external-member, internal-external Chair/Member, headquarters-internal),
- △ Nurturing Corporate Sponsor & Strategic Partner relationships,
- △ Negotiating the terms of the respective agreement and proposing mutually beneficial solutions,
- △ Coordinating successful exhibit hall activation (including, in many instances, concept, implementation and delivery of desired activation plan),
- △ Identifying, developing and executing onsite issue-resolution and event-optimization plans, creating/approving all event related collateral, etc.;
- △ Setting up "Candidates Corner" in several respects, including, but not limited to: managing all pre-event requested and anticipated aspects (external-third party, external-member, internal-external Chair), and
- △ Providing onsite legal support, advice, negotiations and issue resolution.

The IP Department is responsible for managing Delta's legal matters and includes the provision of in-house legal services. The legal components include, but are not limited to reviewing, drafting and negotiating contracts and ensuring compliance of all parties. It is the duty of this department to manage and provide general legal advice regarding the various aspects of the Sorority's legal needs.

This department provides staff support and technical assistance to the Constitution and Bylaws Committee and the Corporate Partnership Task Force.

MEMBERSHIP DEPARTMENT

This department is responsible for the education and development of members/chapters in the areas of: internal program policies, standards, and procedures; leadership training and orientation; administration of chapter establishment and re-establishment; issuing of duplicate charters and membership certificates; withdrawal of membership; and internal rules and regulations of the organization.

The Membership Department coordinates all member/customer care services and functions. This includes being the first point of contact to respond to members' telephone and written inquiries; and provides information about the Sorority's membership benefits and services. This department also assists with help desk services regarding online registration for the national convention and regional conferences.

This department administers the Sorority's national financial aid program — individual, special and Seed Grants for chapter innovative scholarships and financial aid projects. It administers the Disciplinary Action process for members and chapters — probation, suspension, expulsions, and appeals — ensuring adherence to the Code of Conduct.

This department receives, processes and ships requests for membership intake materials; provides member services in the areas of reclamation and retention; verifies and disseminates 25/50-year certificates and plaques; processes and ships life membership plaques; and prepares, distributes and maintains reports and records on corporate compliance of chapters which also includes requests for special dispensation.

It assists with:

- △ The coordination of workshops/training for Advisors, Membership Intake and DID Trainers; and offers technical assistance to state, regional and national trainers to ensure consistency in information, etc.;
- △ Updating and providing college/university related items/tools via email/online; processing and awarding regionally, seven chapters for receipt of the Minerva Award for Academic Excellence; and the transition of officers;
- △ Updating, drafting, and publishing various internal program work tools, handbooks, i.e., Chapter Management Handbook, *Ritual*, Protocol and Traditions Manual, Pyramid Study Guide, Administrative Procedures for Membership Intake, Regional Officers Handbook, Advisors Handbook; Scholarship and Standards Committee Handbook; and other related tools for national convention and regional conference, i.e., conference/convention workbook; and
- △ Providing logistical needs for the plenaries and workshop sessions for the national convention; and internal training workshops during the regional conferences.

This department provides staff support and technical assistance to convention and conference leadership teams and the following national committees/groups: Scholarship and Standards, Leadership Academy, Membership Services, Ritual and Ceremonies Commission, Protocol and Traditions, Documents Review and Management, Regional Officers, and other related committees/task forces.

PROGRAMS AND COMMUNICATIONS DEPARTMENT

This department is responsible for communications and public relations activities to include media relations, membership communications and coordinating and producing the Sorority's official publications. Position Statements, press releases and official announcements issued by the Sorority are channeled through the public relations staff. Departmental staff has responsibility for monitoring the Sorority's legislative, advocacy, governmental affairs and public policy priorities and fosters inter-agency coordination and membership involvement in public and social policy issues.

Programs and Communications provides technical assistance to chapters in the development and implementation of programs and activities on the local, state and regional level; and is responsible for coordinating the production and development of program related work tools, manuals, and other materials that provide assistance and guidance to chapters and members regarding the mandated national programmatic initiatives of the organization. Program department staff monitors chapter progress, compiles data on chapter involvement and takes measures to ensure that chapters have the necessary tools to conduct their activities under Delta's Five-Point Programmatic Thrust which includes initiatives in Program Planning and Development, Arts and Letters, Information and Communications, and Social Action.

In addition to implementing the programmatic activities that address the policies, goals and objectives of Grand Chapter and the Executive Board, Programs and Communications responsibilities include the publication of various other communications of the Sorority. It coordinates and works closely with assigned committees/commissions in implementing special events including: Delta Days in the Nation's Capital, Delta Day at the United Nations, national summits and symposiums. The department engages in networking and forming partnerships with other organizations as approved by the Sorority. Departmental staff also supports and coordinates workshops and training at national conventions and regional conferences.

This department provides staff support and technical assistance to the following National Committees/Commissions: Program Planning and Development Committee, Social Action Commission, Information and Communications Committee, Arts and Letters Commission, and the Distinguished Professor Endowed Chair Committee.

TECHNOLOGY SERVICES DEPARTMENT

This department is responsible for the automating of Grand Chapter's membership records and business functions. It provides in-house information systems/computer operations for the entire organization.

Technology Services is responsible for coordinating and managing online registration for national conventions, regional conferences and other Delta meetings/conferences. Included in the process is delegate certification and onsite registration management.

The team provides statistical data and reports on chapters and the membership; and provides staff support and technical assistance to the following national committees/groups: Executive Committee, Scholarship and Standards, Information and Communications, Technology Committee and Regional Officers.

INFORMATION: "How May I Direct Your Call?"

MEMBERSHIP

Membership Intake Inquiries and Concerns; Duplicate Membership Certificates; Ritual & Ceremonies Inquiries; Honorary Member Task Force
Soror Linora Carr, *Membership Intake Specialist*, ext. 395,
lcarr@deltasigmatheta.org

Duplicate Sorority Pins and/or Membership Certificates; Inquiries Regarding Membership Intake Materials and Paperwork
Toby Coulter, *Membership Intake Assistant*, ext. 553,
tcoulter@deltasigmatheta.org

Chapter Compliance, Special Dispensation; 50-year Pins, 25- and 50-year Plaques and/or Certificates; Withdrawal from Membership; Reclamation and Member Reactivation; Membership Services Inquiries; Leadership Academy; Leadership DELTA; Compliance GPA; Transition Checklist
Katherine Brown, *Membership Services Specialist*, ext. 396,
kbrown@deltasigmatheta.org

Member Concerns regarding Rules of Order; Policies and Procedures; Disciplinary Actions and/or Appeals; Constitution & Bylaws; Code of Conduct Interpretation
Soror Shontel Rogers Hawkins, *Membership Coordinator*, ext. 394,
srogershawkins@deltasigmatheta.org

Golden and Diamond Life Plaque Inquiries; Verification of Membership; Member/Chapter Info Chapter Reactivation and/or Chartering; Leadership Academy; Leadership DELTA
Tammy Valentine, *Member/Chapter Information Specialist*, ext. 567,
tvalentine@deltasigmatheta.org

Member Concerns regarding Dues; Membership Cards; Validation Stickers; Name and/or Address Changes; Verification of Membership; and Member/Chapter Information
Krystle Williams, *Member Relations Representative*, ext. 542,
kwilliams@deltasigmatheta.org

Trouble shooter for Membership Intake/Disciplinary Action/Allegations and Appeal concerns
Soror Shontel Rogers Hawkins, *Membership Coordinator*, ext. 394,
srogershawkins@deltasigmatheta.org

Special Membership Concerns; Scholarship and Standards Concerns; Protocol & Traditions Inquiries; Financial Aid/Scholarships; Seed Grants
Soror Deirdre Shoulers, *Membership Director*, ext. 543,
dshoulers@deltasigmatheta.org

TECHNOLOGY SERVICES

Special Technology Concerns, Web Site Internet Guidelines, and Special Technology Requests
Soror Aaisha Rogers, *Technology Services Director*, ext. 563,
arogers@deltasigmatheta.org
(Due to the volume of emails, please allow 3-5 business days for a response.)

Special Technology Projects, Red Zone Reports, Red Zone Forms
Soror Britanni Washington, *Technology Services Coordinator*, ext. 583,
bwashington@deltasigmatheta.org
(Due to the volume of emails, please allow 3-5 business days for a response.)

The National Website Maintenance, Red Zone Maintenance, Members Only Maintenance, and The Sisters Only Maintenance
Soror Lauren Owen, *Web Design and Development Specialist*, ext. 578,
lowen@deltasigmatheta.org

Registration Difficulties, Registration, Cancellations, Transfers of Registration, Not Receiving Delta Emails
Soror LaMisa Livingston, Jr., *Information Analyst*, ext. 549,
livingston@deltasigmatheta.org

Transfers of Membership Affiliation, Advisor Certification Form and/or Member Financial Verification; NOT Receiving DELTA Newsletter and DELTA Journal; and Registration Difficulties
Carrie Banks, *Technology Services Secretary*, ext. 547,
cbanks@deltasigmatheta.org

HELP DESK during Regional Conferences

202.469.4700 or email conventionservices@deltasigmatheta.org

FINANCE

Wire Transfers; Fee Remittances
Beverly Barnes, *Finance Secretary*, ext. 393, bbarnes@deltasigmatheta.org

On-line Dues; Chapter Fees; Outstanding Transmittals
Soror Crystal Mitchell, *Finance Coordinator*, ext. 391,
cmitchell@deltasigmatheta.org
Beverly Barnes, *Finance Secretary*, ext. 393, bbarnes@deltasigmatheta.org
Regina Myles, *Accounting Assistant/Accounts Receivable*, ext. 392,
rmyles@deltasigmatheta.org
Terrance Jones, *Accounting Assistant/Bookkeeper*, ext. 552,
tjones@deltasigmatheta.org
Tura Gebeyehu, *General Accounting Assistant*, ext. 551,
tgebeyehu@deltasigmatheta.org

Annual Finance Report (Form 990), Quarterly IAR-1 Form, Annual IAR-1 Form; Bonding and Liability Insurance

Terrance Jones, *Accounting Assistant/Bookkeeper*, ext. 552,
tjones@deltasigmatheta.org
Tura Gebeyehu, *General Accounting Assistant*, ext. 551,
tgebeyehu@deltasigmatheta.org

Special Financial Concerns

Soror Gwendalyn K. Dailey, *Director of Finance*, ext. 502,
gkdailey@deltasigmatheta.org

PROGRAMS & COMMUNICATIONS

General Information/Questions Concerning the DELTA Newsletter/Journal; and Submitting News Items for the DELTA Newsletter and DELTA Journal
Soror Bernadine Williams Stallings, *Publications and Communications Specialist*, ext. 383, bstallings@deltasigmatheta.org

Questions and Information Regarding Arts and Letters Programs, Activities and Projects

Soror LaWanza Spears, *Public Relations Specialist*, ext. 574,
lspears@deltasigmatheta.org

Social Action; Delta Days in the Nation's Capital; Delta Day at the UN Legislative and Public Policy Issues

Soror Shambulia Gadsden Sams, *Policy Specialist*, ext. 557,
sgadسدensams@deltasigmatheta.org

General Information and Questions on the Five Point Programmatic Thrust, Risk Management and Compliance, Chapter Demographics

Soror E. Missy Daniels, *Program Coordinator*, ext. 384,
emdaniels@deltasigmatheta.org; or Soror Lakeisha Scott, *Program Specialist*, ext. 558,
lscott@deltasigmatheta.org

Program Initiatives: Delta Academy, Delta GEMS, EMBODI

Soror Lakeisha Scott, *Program Specialist*, ext. 558,
lscott@deltasigmatheta.org

Chapter Demographic and Program Reporting Forms

Soror Carolyn McCrea, *Programs and Public Relations Director*, ext. 541,
cmccrea@deltasigmatheta.org

Special Social Action, Program Planning and Public Relations Concerns; Commission on Arts and Letters; Information and Communications Committee

Soror Carolyn McCrea, *Programs and Public Relations Director*, ext. 541,
cmccrea@deltasigmatheta.org

INTELLECTUAL PROPERTY

Vendor Certification & Exhibit Trade Show

Soror Nicole Lenon Johnson, *Intellectual Property Specialist*, ext. 399,
njohnson@deltasigmatheta.org

Enforcement - Reporting Violators of the Vendor Certification/Licensing Policy (Internet, Social Media, In-Store, etc.) & Exhibit Trade Show

Kyrstal Milam, *Assistant*, ext. 582, kmilam@deltasigmatheta.org

General Legal; Intellectual Property/Brand Ownership Scope & Rights;

Corporate Sponsor & Strategic Partnership Opportunities
Soror Meka N. Simmons, *Intellectual Property Director*, ext. 504,
tsimmons@deltasigmatheta.org

FACILITIES & PROPERTY MANAGEMENT

Publication Orders for Items Such As: Chapter Management Handbooks, Doctrines, Video Tapes, Forms, etc.

Betty Martin, *Receptionist*, ext. 381 or Beverly Corbin, ext. 380,
bmartin@deltasigmatheta.org or bcorbin@deltasigmatheta.org

Heritage and Archives; Housing and Properties Committee; Tours; Special Order Fulfillment Concerns

Soror Garlanda McNair, *Facilities and Property Management Director*, ext. 382,
gmcnair@deltasigmatheta.org

EXECUTIVE OFFICE/OPERATIONS

Special Operations/Concerns

Soror Dorcas Washington, *Deputy Executive Director*, ext. 575,
dwashington@deltasigmatheta.org

Special Member Concerns/Needs not Addressed in this Listing

Soror Jeanine Arnett, *Executive Director*, ext. 516,
jarnett@deltasigmatheta.org

Delta Sigma Theta Sorority, Inc.

1707 New Hampshire Avenue, NW, Washington, D.C. 20009

Phone: (202) 986-2400, Fax: (202) 986-2513

Hours: Monday-Friday, 8:30 am-5:30 pm E.S.T.

www.deltasigmatheta.org

Any topic not covered should be addressed to dstemail@deltasigmatheta.org

Direct all inquiries for **DREF** to:

Soror Patricia W. Lattimore, CEO, 202-347-1337,
plattimore@deltafoundation.net

REVISED 9-19-17

SECTION XVI

LEGAL RESPONSIBILITIES



YOUR DUTIES TO DELTA

Chapter officers and members have a legal duty to act responsibly and in the best interest of the organization at all times. With every action, chapter officers and members should ask:

- △ What is the potential legal liability to Delta?
- △ Will this action damage Delta's reputation and goodwill?
- △ How best to carry out my duties?

**BE KNOWLEDGEABLE,
ALWAYS PERFORM DUE DILIGENCE, AND
DO NOT PRACTICE SITUATIONAL ETHICS**

Three Areas That Require Heightened Awareness

- △ Intellectual Property Protection
- △ Membership Intake
- △ Youth Initiatives

INTELLECTUAL PROPERTY PROTECTION

Intellectual property ownership

Delta owns **ALL** intellectual property related to it, which includes all iterations of its name, any Delta logo -- e.g., the Pyramid and Greek letters symbols, word(s) or phrase(s) commonly associated with, and understood to refer to, Delta, and the "look" of any mark used to distinguish merchandise and service as being associated with or related to Delta, including its color combination and year of founding.

What constitutes Delta's Intellectual Property?

- △ **Trademarks** – identify source of goods/merchandise
- △ **Service Marks** – identify source of the service
- △ **Copyright** – exclusive right relating to printing and recording

1. No individual member, no chapter of Delta, and no Delta members or sorors who have affiliated as a group for any purpose, own any of Delta's intellectual property.
2. No member (individually or as a part of a group) is authorized to use any property for any commercial purpose (i.e., to make money from using the property and/or to promote other causes), or to authorize any third party to use Delta's intellectual property for any purpose.
3. Only Licensed Vendors are authorized to sell merchandise emblazoned with Delta's Marks, and even licensed vendors must seek approval of their designs bearing Delta's Marks.
4. Licensed Vendors must complete and execute the Contract for Production of Merchandise when contracting with a chapter.

5. Licensed vendors must complete and execute the Contract for Exhibit Space when contracting with a Chapter.

Understand that Delta's Trademarks and Service Marks are its brand. They attract members and promote Delta's goodwill and reputation.

"Good brands give people an identity that makes them feel secure, as if they belong to a group of like-minded travelers."

"You cannot protect Delta's intellectual property if you do not value it."

"Managing a brand requires knowledge and discipline."

BRAND WARFARE by DAVID F. D'ALESSANDRO

Knowledge: Knowing the value of Delta's Marks and how that value is affected

Discipline: Having and consistently implementing a plan designed to protect and increase the value of the Marks.

- △ Does Delta spend more on parties, entertainment, and receptions than it spends to protect and enhance its Marks?
- △ The business, legal, and academic world takes note of how you value Delta's Marks, and they assess value the same way.

"A healthy respect for the brand is contagious." BRAND WARFARE

What Members Should Do:

- △ Purchase paraphernalia only from licensed vendors.
- △ When placing orders for merchandise for your events, ensure there is a written contract.
- △ Report vendors that violate the vendor license agreement
- △ Do not infringe the Marks yourself.

STATEMENT ON HAZING

Delta Sigma Theta Sorority, Incorporated has a ***zero tolerance no-hazing policy*** in place and continues to enforce its tenets. The Sorority is opposed to any acts of harassment or violence during the Membership Intake Program or in the conduct of sorority business. As a result, the Sorority assumes an affirmative action program that integrates the basic tenets of the individual value and the worth of each member into every facet of sorority life.

Regularly, and on a consistent basis, it is incumbent upon us to review those policies to remind each of us of our responsibility to behave in a manner that is within the framework of Delta's no-hazing policies and to uphold the law on Criminal Hazing.

Delta Sigma Theta Sorority, Incorporated recognizes its responsibility to protect human dignity and promote positive personal growth. Hazing is strictly prohibited by any member of the Sorority.

Delta Sigma Theta Sorority, Incorporated defines hazing as an act that threatens the mental, physical, academic health, or safety of an applicant, candidate, pyramid or member through actions or situations that endanger, embarrass, harass, demean or ridicule any person regardless of locations, intent or consent of individuals.

Log into the Members Only – National Area – Scholarship Standards Section at <https://members.dstonline.org/National-Area> to view and download the Legal Primer.

WHISTLEBLOWER POLICY

Statement of Commitment and Purpose

Delta Sigma Theta Sorority, Incorporated (the "Sorority") is committed to the highest ethical, intellectual, cultural and moral standards. The Sorority endeavors, and members should exemplify, public and personal conduct that reflects the ideals and principles adopted by the Sorority, which include the Sorority's efforts to comply with all applicable laws that govern the Sorority. The Sorority can best achieve its goals when members and sorors as well as those who aspire to become members, faithfully follow the Sorority's governing documents, which includes reporting suspected violations of the governing documents. To facilitate the reporting process, the Sorority has established this Whistleblower Policy, which includes an acknowledgement form that shall be signed by members, sorors and prospective members.

This Whistleblower Policy is intended to encourage and enable members and sorors as well as applicants, candidates, pyramids (collectively "prospective members") to raise concerns internally regarding unethical or unlawful practices so that the Sorority can address and correct misconduct. It is the responsibility of all members and sorors and all prospective members to report violations (or suspected violations) of the Sorority's Code of Conduct and other governing documents. While this Policy applies to all allegations of

misconduct, the Sorority understands that reports by prospective members likely would relate solely to misconduct that violates (or is believed to violate) the Membership Intake Process.

The Sorority's governing documents include, but are not limited to, the; Chapter Management Handbook; Administrative Procedures for Membership Intake, including The Acknowledgement of Rights and Responsibilities of Members of Delta Sigma Theta Sorority, Inc. regarding Membership Intake Prohibitions (Members No Hazing Contract) and the Notice to Applicant/Candidate/Pyramid Regarding Privilege and Responsibilities; and the Code of Conduct.

Definition of Whistleblower

A Whistleblower is a member, soror, or prospective member who reports suspected unethical or illegal activity; or activity that violates the Sorority's governing documents.

Reporting Procedures

Allegations of suspected misconduct or violations of the Sorority's governing documents should be made in good faith based on reasonable grounds for suspecting that an activity or particular conduct constitutes a violation of the governing documents.

Reports of violations should be made in writing so as to assure a clear description of the issues; however, reports may be made orally when the urgency of a matter does not allow one to make a report in writing. Oral reports shall be audio-recorded to ensure clarity of the reported actions. Prior to beginning the recording, the person receiving the report ("Receiving Individual") shall seek the permission of the person making the report ("reporting Individual") to audio-record the report. Upon receiving consent to record, the Receiving Individual shall repeat the consent question and answer immediately before beginning the recording.

All allegations of misconduct or suspected misconduct should be factual rather than speculative or conclusory and, whether written or oral, should contain sufficiently detailed information to aid the Sorority in conducting a thorough and complete investigation. "Detailed information" includes, but is not limited to: information about: where and when the incident or activities occurred; a description of the activities or misconduct; the names and titles of the individuals who allegedly participated in the misconduct; the names, title (if appropriate) and contact information (if available) of any person who witnessed or has knowledge of the alleged misconduct; the name of the chapter involved; and any other pertinent information. The Reporting Individuals should refrain from (1) obtaining evidence that they do not have right to access and (2) conducting their own investigation.

Reports shall be made to the appropriate Sorority officials, in the following order: the chapter president; the chapter advisors; the Regional Director and Regional Representative; and/or the National First Vice President **and** the Executive Director of the Sorority. If the Reporting Individual is not comfortable reporting to any of the foregoing individuals or is not satisfied with their response, the Reporting Individual should immediately escalate the reporting to the next level. ***Anyone making a report pursuant to this policy***

always has the option of contacting the National First Vice President and/or the Executive Director directly. Authorized persons will conduct a prompt, discreet, and objective investigation.

No Retaliation

It is contrary to the values of the Sorority and its Code of Conduct for anyone to retaliate against anyone who in good faith reports an ethics violation, a suspected violation of law, or a suspected violation of the Sorority's governing documents. Anyone who retaliates against anyone who has reported a violation in good faith shall be subject to discipline, as appropriate pursuant to the Sorority's Code of Conduct, up to and including expulsion from the Sorority if the retaliation was by a member or soror, or preclusion from membership, if the retaliation was by an applicant or candidate. Where it appears that retaliation violated a federal or state law, the Sorority will refer the matter to the appropriate investigatory agency.

Reports Made in Bad Faith

The Sorority reserves the right to discipline members, sorors and prospective members who make bad faith, malicious, knowingly false, or frivolous allegations and complaints and/or who otherwise abuse this policy. Anyone making a complaint concerning a violation or suspected violation must be acting in good faith and have reasonable grounds for believing the reported conduct constitutes a violation of the Sorority's governing documents.

With respect to misconduct in the Membership Intake Process, the Sorority reserves the right to reduce or expunge any sanctions imposed on applicants, candidates, pyramids, members, or sorors who knowingly participate in acts that violate the Membership Intake process, but who made good faith efforts to report such violations to the appropriate officials.

CONFIDENTIALITY

Violations or suspected violations may be reported under this policy on an anonymous basis. ***Although the Sorority will receive and act promptly upon anonymous reports of violations, anonymous reports may preclude Sorority officials from conducting a thorough investigation of the allegations.*** Reports of violations or suspected violations will be kept confidential to the extent possible. The Sorority's efforts to maintain confidentiality shall include calibrated disclosure, meaning the Sorority will exert maximum efforts to protect the identity of the Reporting Individual and shall make other disclosures only as necessary for it to conduct a thorough investigation.

APPENDICES

APPENDICES

- A-1 Annual Review Acknowledgment University's Code of Conduct and/or Student Handbook
- A-2 Audio/Video Recording Consent Form
- A-3 Information Sheet for Chapters/Sorors under Cease and Desist
- A-4 Initial Steps for Chapter Establishment
- A-5 Chapter Rules of Order Form
- A-6 Expelled Member Letter Example
- A-7 Impeachment Hearing Date Selection Form
- A-8 Impeachment Hearing Summary
- A-9 Inactive Chapter Member(s) Report
- A-10 Transition Summary Checklist for Officers/Positions/Committee Chairs
- A-11 Perpetrator Letter Example
- A-12 Petition for Impeachment
- A-13 Policies and Procedures Sample Outline
- A-14 Proposed Minerva Circle for Chapter Reactivation
- A-15 Region Probationary Plan for Chapter
- A-16 Region Probationary Plan for Individual Member
- A-17 Region Probationary Plan for Individual Soror
- A-18 Request Form for Excused Absence from a Regional Conference
- A-19 Request Form for Excused Absence from a National Convention
- A-20 Verification of Membership for Visiting Sorors Protocol

APPENDIX: A-1**DELTA SIGMA THETA SORORITY, INC.***A Public Service Sorority Founded in 1913*

**ANNUAL REVIEW ACKNOWLEDGMENT
UNIVERSITY'S CODE OF CONDUCT AND/OR STUDENT HANDBOOK**

DIRECTIONS: A meeting and/or presentation to review the University's Code of Conduct and/or Student Handbook must be held annually during the Fall Semester. This form must be completed for compliance and submitted to the Regional Director and the Regional Representative no later than **September 15th or prior to Fall Membership Intake.**

PART I: CHAPTER INFORMATION

Chapter Name:			
Chapter Number:		Region:	
University:			
City:		State:	

PART II: REVIEW DETAILS

Review Date:		Timeframe/Duration:	
Financial Members (#):		Members Present (#):	
Chapter Advisors (#):		Advisors Present (#):	
Summary of Topics Covered (To include...Hazing Policy, Student Conduct and University Rules & Regulations):			

PART III: UNIVERSITY OFFICIAL (Person Facilitating Session)

Name:			
Title:			
E-mail Address:			
Phone Number:			

PART IV: REVIEW ACKNOWLEDGEMENT

Chapter President:		Date:	
Primary Advisor:		Date:	
University Official*:		Date:	

**Must be completed by appropriate official.*

APPENDIX: A-2

**Delta Sigma Theta Sorority, Inc.
Audio/Video Recording Consent Form**

Region: _____

Chapter: _____

City/State: _____

Please check all that apply:

Advisor _____ Chapter Officer _____ Chapter Member _____ Other _____

I _____ **[print name]** understand that Delta Sigma Theta Sorority, Incorporated is investigating allegations of **[briefly describe the investigation]**. The investigation is being conducted by members of Delta Sigma Theta Sorority, Incorporated.

I have voluntarily agreed to be interviewed as a part of the investigation and have voluntarily agreed to allow the investigator to audio record _____ **or** video record _____ the interview, including questions I am asked and statements or comments I make or questions I ask in response to the questions I am asked. [Check and initial on the appropriate line].

I understand that I have the right to request that the recording be discontinued at any point during the interview, and that my request will be honored.

I understand and agree that the recording or information from it may be used in the investigation Delta is conducting and in any subsequent litigation involving Delta Sigma Theta Sorority, Incorporated. I understand if I say anything incriminating, that the statement(s) or inference(s) therefrom will be recorded, and that there is the possibility that the incriminating statements could be used any litigation in which I may be called as a witness.

I understand that the recording and any notes of the recording become the property of Delta Sigma Theta Sorority, Incorporated, and that Delta Sigma Theta Sorority, Incorporated will maintain the recording pursuant to its records retention policy.

Agreement and Signature

I have read this entire Consent Form and have had the opportunity to discuss its contents with the Lead Investigator in this matter, my parents, and/or legal counsel of my choosing before signing it. I understand and agree to all its terms. I acknowledge receipt of this Agreement

Witness's Signature_____
Date

[The Next Page Identifies the Investigators]

Investigators:

Lead Investigator's Name and Signature

Date

Other Investigators (List roles in Investigation)

Print Name and Date

Role

Signature

Print Name and Date

Role

Signature

Print Name and Date

Role

Signature

APPENDIX: A-3

Information Sheet for Chapters/Sorors under Cease and Desist

What is Cease and Desist?

A written directive issued by the Regional Director/National President/Chair, National Scholarship and Standards as a reaction to a reported allegation that may be in violation of Delta's Code of Conduct.

What to expect while on Cease and Desist?

- △ Written notification from Regional Director/National President/Chair, National Scholarship and Standards regarding Cease and Desist.
- △ When the Regional Director/National President/Chair, National Scholarship and Standards has issued a Cease and Desist order to a chapter or soror, the chapter or soror must stop all Delta activities until the Cease and Desist order has been lifted, unless the Regional Director has approved participation in certain activities.
- △ Chapters must continue fulfilling all ongoing financial obligations and reimburse any expenses that occurred prior to the Cease & Desist order. The Regional Director and the National First Vice President will work with the local chapter's fiscal officers to develop a plan of action for chapter financial management during the Cease & Desist.
- △ Periodic updates on status of the investigation, if required.
- △ The investigation team to collect statements from involved parties.

The types of activities which a chapter or soror **may be approved** to participate in during Cease and Desist only at the discretion of the Regional Director/National President/Chair, National Scholarship and Standards are:

- △ DID or other Delta related training Workshops.
- △ Regional conference/national convention or other regional meetings to attend specifically designated sessions/workshops.
- △ Public service or fundraising events if the chapter has signed contracts which, if breached, would result in a significant monetary loss or damage to the chapter, or would damage Delta's reputation.
- △ University mandated activities i.e. Day of Service.

The types of activities which a chapter or soror **cannot** be permitted to participate (not attend or assist in planning or implementing) in during Cease and Desist are:

- △ Chapter seating as a Voting or Alternate Delegate at a regional conference/national convention.
- △ Chapter meetings and/or functions, Committee meetings, and Executive Board meetings.
- △ Membership Intake Process (preparation and/or actual process)
- △ Public Service Projects, chapter and/or jointly sponsored, representing Delta).
- △ Fundraising Events in the name of the chapter.
- △ State/Cluster and local meetings such as Founders Day, chapter sponsored campus programs, Forums and other Delta events not open to the general public.

The types of activities which a chapter or soror **will be required** to participate in during Cease and Desist are:

- △ Regional/National Officer directed training.
- △ Participation in the investigation process.

The chapter/soror can expect during the investigation:

- △ To receive a request to participate in the investigation (time and date will be provided).
- △ Written account of allegations from the Regional Director and explanation of next steps.
- △ To be asked not to discuss any events with any parties concerning the investigation (either before giving a statement or afterwards).
- △ To be asked to provide a written and verbal account of the incident(s) requiring the investigation.
- △ To be asked to sign a Witness Statement.
- △ Notification to the Collegiate/University official via the Allegation Report Form of incident(s) and pending organization investigation.

Until the investigation is complete and the Regional Director/National President/Chair, National Scholarship and Standards lifts the Cease and Desist, the chapter/soror will not function in Delta's name nor wear Delta paraphernalia or represent Delta and/or the chapter in any way, except as approved by the Regional Director/National President/Chair, National Scholarship and Standards.

At the completion of the Cease and Desist and depending on the outcome of the investigation, the chapter/soror can expect the following:

- △ To be cleared of any alleged code of conduct violations and permitted to begin functioning again;
- △ Sanctions levied against the involved parties;
- △ Rehabilitation plan developed by the Regional Director/National President/Chair, National Scholarship and Standards may be required.

APPENDIX: A-4

DELTA SIGMA THETA SORORITY, INC. Initial Steps for Chapter Establishment

COLLEGIATE

Applications for chapter establishment must be submitted for processing between September 1 and March 1 of each year, and all related activities must be completed by April 30.

Students who are interested in chartering a campus-based chapter at their college/university can only do so if Greek organizations are already established on their campus. If not, they will need to contact the Student Affairs Office to determine if the school is receptive to establishing a chapter.

An official representative from the college/university interested in establishing a chapter must contact the Regional Director and indicate the school's desire. Contact information can be acquired from Delta Sigma Theta Sorority's official website.

A college/university can request to become a part of an existing core or city-wide chapter, however, a letter of approval from each college/university listed on the charter must be obtained on official letterhead and submitted to the Regional Director.

*If it is the desire of the college/university to **re-establish a retired chapter**, a strong rationale for doing so would have to be submitted to the Regional Director expressing why they feel the chapter would now be able to sustain itself. The Regional Director will then assess the group's sustainability; if viable, she will notify the Member/Chapter Information Specialist at National Headquarters via email and request an **Application for Collegiate Chapter Re-Establishment** be mailed to the contact person.*

The Regional Director will assess the school's ability to sustain and provide ongoing support of a chapter. If viable, she will notify the Member/Chapter Information Specialist at National Headquarters via email and request an **Application for Collegiate Chapter Establishment** be mailed to the appropriate contact person. Contact information for our Membership Department staff is also posted on the website.

Collegiates interested in membership **must first** have the required cumulative 2.75 grade point average, verifiable via an official transcript. All other requirements will be shared during the scheduled Rush activity which will orient the interested group on the various policies and procedures of the organization as it relates to membership intake, which includes the viewing of the Rush video.

The minimum number needed to establish a chapter is seven, but preferably there should be at least 15 interested women. If there are interested persons of senior classification, they are not counted in the minimum number required.

Delta Sigma Theta Sorority, Inc. is a national service sorority, therefore applicants should be aware that there is a public service requirement; and it also necessitates a letter of recommendation from a financial member in good standing with the organization.

ALUMNAE

The contact person for the proposed chapter must contact the Regional Director and indicate the group's desire to establish a new chapter. All members of the group must be duly initiated members of the Sorority.

The Regional Director will assess the group's sustainability; if viable, she will notify the Member/Chapter Information Specialist at National Headquarters via email and request an **Application for Alumnae Chapter Establishment** be mailed to the group's contact person.

Note: Members of the group (proposed charter members) should not conduct any collective activities prior to the completion of the chapter's charter.

There must be a minimum of 12 financial Deltas, preferably 15, applying for the new chapter. However, if the proposed chapter is to be established within 40 miles of the city or county line of an existing alumnae chapter, it is then considered an additional chapter. This means that the application for chartering must consist of 24 members. If this is considered a third chapter, 36 members are needed ($24 + 12 = 36$); a fourth chapter, 48 members ($36 + 12 = 48$); and so on.

All members to be listed on the application for the proposed chapter, must live in the area where the chapter is designated to serve. Also, any new members initiated, must reside in the area being served.

The contact person for the group submitting the **Application for Chapter Establishment** must provide evidence that the proposed chapter is capable of meeting continuing requirements of Grand Chapter; the community can support a chapter; and the proposed chapter is capable of meeting community needs.

NOTE: *If it is the desire of the interested group to re-establish a retired chapter, a strong rationale for doing so would have to be submitted to the Regional Director expressing why they feel the chapter would now be able to sustain itself. The Regional Director will then assess the group's sustainability; if viable, she will notify the Member/Chapter Information Specialist at National Headquarters via email and request an **Application for Alumnae Chapter Re-Establishment** be mailed to the group's contact person.*

Please know that collegiate and alumnae chapter establishment and/or re-establishment is subject to approval by the Regional Director, National First Vice President and National President.

APPENDIX: A-5

DELTA SIGMA THETA SORORITY, INC.
 A Service Sorority Grand Chapter
 1707 New Hampshire Avenue, N.W. Washington, DC 20009



CHAPTER RULES OF ORDER FORM

***Instructions:** Chapters MUST submit this form each fiscal year by June 30th to the Regional Member of the Scholarship & Standards Committee. Once approved by the Regional Member of Scholarship & Standards Committee each chapter member MUST receive a copy of this completed form. Newly established or reactivated chapters MUST submit within 30 days of establishment or reactivation.*

Policies & Procedures Confirmation

Please confirm if there have been changes to Chapter Policies & Procedures since the last approval date.
 NO YES—If YES, please submit revised Policies & Procedures.

To	National Scholarship & Standards Regional Committee Member			
Form	Chapter Name		Chapter	
	Chapter		Charter	
	Chapter Email			
	# of Financial		Region	
Chapter Service				
Mailing				
City		State		Zip
Chapter Meeting				
Elected Officers (If applicable add...Assistant Financial Secretary and Assistant Treasurer):				
Every chapter MUST have the following Elected Officers (depending on chapter size): President, Recording Secretary, Treasurer, Vice President, Corresponding Secretary, Financial				
Appointed Positions (Must be consistent with Policies & Procedures—i.e. Parliamentarian, Chaplain, Sergeant- at-Arms, etc.):				

Elected Positions (Must be consistent with Policies & Procedures):

Every chapter **MUST** have the following Elected Positions (depending on chapter size): **Internal Audit Committee Chair, Nominating Committee Chair, Nominating Committee (list #), and Minerva Circle. Must also include Parliamentarian, Chaplain, Sergeant-at-arms, etc. if elected.**

Standing Committee (Must be consistent with Policies & Procedures):
Every chapter MUST have the following Standing Committees (depending on chapter size): Internal Audit, Nominating, Policies & Procedures, Finance and Program, Planning & Development
Special Committees (Must be consistent with Policies & Procedures—i.e. Founders Day, Minerva Circle, Elections Committee):
Every chapter MUST have an Elections Committee.

There are NO restrictions on new initiates, such as requiring them to be members for a certain period of time before they can vote. Once initiated, a member has full rights and privileges of the chapter and cannot be denied the right to vote.

Process for selection of voting/alternate delegates and other chapter representatives:

If not already designated per the chapter Policies and Procedures, it is highly recommended that the chapter decide on the regional conference and national convention voting and alternate delegate by chapter vote. In addition, include the method for how members are selected to serve as the chapter representative at State and/or Cluster Meetings, Delta Days in the Nation’s Capitol and State Delta Days.

Voting Delegate	
Alternate Delegate	
Delta Days in the Nation’s Capitol	
State Delta Days Representative	
Cluster Meeting Representative	
State Meeting Representative	

(Advisors Section – For Collegiate Chapters Only). Must be voted upon by position

Primary Advisor			
Email Address			
Day Phone #		Evening Phone #	
Secondary Advisor			
Email Address			
Day Phone #		Evening Phone #	
Advisory Council			
Email Address			
Day Phone #		Evening Phone #	
Advisory Council			
Email Address			
Day Phone #		Evening Phone #	

Advisory Council			
Email Address			
Day Phone #		Evening Phone #	
Advisory Council			
Email Address			
Day Phone #		Evening Phone #	
Advisory Council			
Email Address			
Day Phone #		Evening Phone #	

Chapter Confirmation

Policies and Procedures			
Email		Ph	
Chapter			
Email		Ph	
Signature			
<i>Do Not include Signature and Date for submittal to Scholarship & Standards Committee Member. Please add Signature and Date only after the document has been approved and before distribution to chapter members.</i>			

APPENDIX: A-6

EXPELLED MEMBER LETTER EXAMPLE

DATE

FIRST-NAME LAST-NAME

ADDRESS

City, ST ZIP

Dear Ms. **LAST-NAME**:

According to our records, you were expelled from the organization as of **DATE-EXPELLED**. However, it has been brought to the attention of the national office that you have continued to represent yourself as a member of Delta Sigma Theta Sorority, Inc. Therefore, this letter serves as a **“Cease and Desist”** effective immediately.

A Cease and Desist means that you are to immediately cease any and all activities related to or those that imply you are a member of Delta Sigma Theta Sorority, Inc. As explained in your expulsion documentation, this includes wearing **any** paraphernalia, using **any** merchandise that has references to Delta Sigma Theta, its symbols or logos, or attendance at any closed or private activities for members of Delta Sigma Theta Sorority, Inc.

At this time, you are requested to immediately return ALL Delta materials in your possession, these materials include, but may not be limited to, the Delta *Ritual*, Code of Conduct, membership directory, any and all other Delta documents. Please send these materials, at your expense, to:

Ms. Shontel Rogers Hawkins
Delta Sigma Theta Sorority, Incorporated
1707 New Hampshire Avenue, NW
Washington, D.C. 20009

Please be advised, if you persist in conduct that in any way fraudulently misrepresents your status as a member of Delta Sigma Theta Sorority, Inc. legal action will be taken against you.

Thank you,

Cheryl A. Hickmon
National First Vice President
Delta Sigma Theta Sorority, Incorporated

APPENDIX: A-7

Impeachment Hearing Summary

Level of Impeachment: Chapter; Regional National

The impeachment hearing for: _____

Position/Office Currently Held: _____ Chapter: _____

Was held on: ____/____/____. Enclosed is a copy of the proceedings of that hearing.

The confidential recommendation of the representatives for the respective category is listed below:

- _____ Chapter (Chapter Impeachment)
- National Executive Board (Regional Impeachment)
- Entire National Executive Board (National Impeachment)

Please check (✓) one:

- The offense(s) is impeachable, and impeachment is effective immediately.
- The offense(s) is unfounded (i.e. not guilty), and no action taken).

_____ Name of Highest Ranking Officer	_____ Signature
--	--------------------



FOR CHAPTER USE ONLY

Return this form to the highest ranking officer, c/o the following independent accounting firm:

Name: _____
 Address: _____
 C/S/Z: _____, _____, _____

Chapter _____ Region: _____

Collegiate Chapter Location: _____ Date: ____/____/____

Chapter President: _____

Address: _____

Chapter President's Signature: _____

APPENDIX: A-8**IMPEACHMENT HEARING DATE SELECTION FORM**

The Impeachment Hearing date, time and location are mutually agreed upon by the representatives of the National Executive Board (Regional Impeachment)/Entire National Executive Board (National Impeachment) and the accused person(s). Please vote for one of the dates listed below:

Please Check (✓) One:

<u>Date</u>	<u>Time</u>	<u>Location</u> (to be determined by highest-ranking officer)	
_____ 1.	_____	_____	_____
_____ 2.	_____	_____	_____
_____ 3.	_____	_____	_____

Notification of the date, time and location will be sent to you within _____ days after the due date for return of this form.

Name (Print Legibly)

Signature (Pen and Ink)

Address

Chapter

Region

Date

APPENDIX: A-9**Delta Sigma Theta Sorority, Incorporated
Inactive Chapter Member(s) Report**

Chapter Name:

Chapter #:

Region:

Semester:

Member NameMember #ClassificationGPA**Academic Plan(s)**

We are requesting that you hold a one-on-one academic planning session with sorors whose cumulative GPA is below the minimum 2.75 requirement. By creating and implementing individual academic plans for the inactive sorors in your chapter, we hope to create a structured framework that will provide them with tools and resources to enhance their study skills and create a culture of excellence which will help them regain active status.

Academic Action Plans must include resource guides which can provide tools such as: principles of academic writing; effective methods to decrease anxiety related to testing; stop procrastination; and improve time management skills, etc.; and developing practical ways to balance school and Delta activities.

△ △ △ △ △

As the Primary Advisor, I confirm that GPAs have been verified using official college/university grade reports. I also commit to meeting with each inactive member of the chapter to develop her specific academic plan, and present her a copy of the **Inactive Member Status Letter** within thirty days.

Primary Advisor:

Date Submitted:

Submit form to the Regional Representative

Cc:

National Headquarters

Regional Director

APPENDIX: A-10**DELTA SIGMA THETA SORORITY, INC.***A Public Service Sorority***OFFICER TRANSITION SUMMARY**

Officer Name: _____

Transition Meeting Date: _____

 Chapter Region National

Chapter Name: _____

Region Name: Central

National Office: _____

Chapter Number: _____

Regional Office: _____

Committee: _____

Chapter Office: _____

SECTION I: STANDARD

What are the primary duties of this office?

--

What were the major accomplishments during your term?

--

Are there any issues related to your office and function?

 YES NO N/A*Give summary of the nature of the problems:*

1.	
2.	
3.	
4.	

Are there priorities underway that should be continued? YES NO N/A

List them:

1.	
2.	
3.	
4.	

Have all files and correspondence been turned over to the newly elected or appointed person assuming this role?

List them:

1.		<input type="checkbox"/> YES <input type="checkbox"/> NO
2.		<input type="checkbox"/> YES <input type="checkbox"/> NO
3.		<input type="checkbox"/> YES <input type="checkbox"/> NO
4.		<input type="checkbox"/> YES <input type="checkbox"/> NO
5.		<input type="checkbox"/> YES <input type="checkbox"/> NO
6.		<input type="checkbox"/> YES <input type="checkbox"/> NO
7.		<input type="checkbox"/> YES <input type="checkbox"/> NO
8.		<input type="checkbox"/> YES <input type="checkbox"/> NO
9.		<input type="checkbox"/> YES <input type="checkbox"/> NO
10.		<input type="checkbox"/> YES <input type="checkbox"/> NO

Have equipment and supplies purchased by the Sorority for use by you in your capacity been transferred?

YES NO N/A

Equipment/Supplies	Date of Purchase	Condition	Transferred
			<input type="checkbox"/> YES <input type="checkbox"/> NO
			<input type="checkbox"/> YES <input type="checkbox"/> NO
			<input type="checkbox"/> YES <input type="checkbox"/> NO
			<input type="checkbox"/> YES <input type="checkbox"/> NO

SECTION II: MEMBERSHIP INTAKE

Have all membership verification forms and Initiation Certification Cards (ICC) been submitted to National Headquarters and completed in the RED Zone?

YES NO N/A

If not, why? List those chapters outstanding and reasons (chapters only):

Chapter	Chapter #	Reason

Have all membership intake issues been resolved?

YES NO N/A

List unresolved issues and reasons:

Chapter	Chapter #	Issue	Reason

Have all chapter investigations been completed?

YES NO N/A

List those outstanding and reasons:

Chapter	Chapter #	Reason

Have all requests for Initiation been cleared?

YES NO N/A

List those outstanding and reasons:

Chapter	Chapter #	Reason

Have all requests for chapter establishment been processed? YES NO N/A

List those outstanding and reasons:

University or City/State or Country	Contact Name	Contact E-mail	Reason

SECTION III: DETAILS

Are there any important commitments made? YES NO N/A

If so, list the event, indicate if tentative (T) or firm (F), list contact person(s) and telephone number(s), and include a copy of the contract, if applicable:

Event	T/F	Contact Person	Contact E-mail	Contact Telephone	Contract Attached
					<input type="checkbox"/> YES <input type="checkbox"/> NO
					<input type="checkbox"/> YES <input type="checkbox"/> NO
					<input type="checkbox"/> YES <input type="checkbox"/> NO
					<input type="checkbox"/> YES <input type="checkbox"/> NO

Have all requests for money been processed? YES NO N/A

List all outstanding receipts and reasons:

Date	Name	Reason

Are copies of the current budget and annual report for this office attached? YES NO N/A

If not, explain why:

Have regional ceremonial properties been transferred? YES NO N/A

Please list all properties to be transferred:

Properties	Yes or No	Date/Expected Date
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
	<input type="checkbox"/> YES <input type="checkbox"/> NO	

Please include all the necessary passwords for access to online files and documents.

YES NO N/A

Name and/or Type	User Name	Password

SECTION IV: IMPORTANT UPCOMING DATES

Date	Task or Event

SECTION V: COMMENTS & RECOMMENDATIONS

NAME _____ **DATE** _____

EMAIL _____ **PHONE** _____

SIGNATURE _____

APPENDIX: A-11

Perpetrator Letter Example

DATE

FIRST-NAME LAST-NAME

ADDRESS

City, State ZIP

Dear Ms. **LAST-NAME**:

It has been brought to the attention of the national office that you are impersonating as a member of Delta Sigma Theta Sorority Inc. To date, we have been unable to locate a record of your membership; therefore, this letter serves as a “**Cease and Desist**” until your membership can be verified.

A Cease and Desist means that you are to immediately cease any and all activities related to or those that imply you are a member of Delta Sigma Theta Sorority, Inc. This includes wearing **any** paraphernalia, using **any** merchandise that has references to Delta Sigma Theta, its symbols or logos, or attendance at any closed or private activities for members of Delta Sigma Theta Sorority, Inc.

As acknowledgement of your understanding of the aforementioned, please forward your membership number, chapter of initiation, initiation date and name at time of initiation to Delta’s National Headquarters Attn: Membership Department, located at 1707 New Hampshire Ave. NW, Washington D.C. 20009.

Should you fail to respond in writing by **DATE TO RESPOND**, Delta’s records will reflect that you are **not** a member of the Sorority. At this time, you are requested to immediately return ALL Delta materials in your possession. These materials include, but may not be limited to, the Delta *Ritual*, Code of Conduct, *Constitution and Bylaws*, membership directory, any and all other Delta documents. Please send these materials, at your expense, to:

Ms. Shontel Rogers Hawkins
Delta Sigma Theta Sorority, Inc.
1707 New Hampshire Avenue, NW
Washington, D.C. 20009

Please be advised, if you persist in conduct that in any way fraudulently misrepresents your status as a member of Delta Sigma Theta Sorority, Inc., legal action will be taken against you.

Thank you,

Cheryl A. Hickmon
National First Vice President
Delta Sigma Theta Sorority, Inc.

APPENDIX: A-12

PETITION FOR IMPEACHMENT

A quorum (%) of the membership of _____
Chapter, located at/in _____

Petition for Impeachment of _____ who currently holds
the office/position of _____
The charge(s)/allegation(s) are: _____

Petitioners Names

AND

Signatures (Pen and Ink)

Name of Highest-ranking Officer of
Is Not Subject of the
Impeachment

Name of Secretary/Certifier Not Chapter Who
of the Impeachment

Signature (Pen and Ink)

Signature (Pen and Ink)

Return within _____ days of date mailed.

APPENDIX: A-13

Delta Sigma Theta Sorority, Incorporated
NATIONAL SCHOLARSHIP AND STANDARDS COMMITTEE

CHAPTER POLICIES AND PROCEDURES OUTLINE

Chapters are not required to list/define positions/committees that have not been approved by the Chapter. Only include information for the officers/positions/committees approved by the chapter.

Effective Policies and Procedures allow chapters to meet Constitutional requirements, work effectively, solve problems, make wise decisions, maintain control and manage chapter affairs.

CHAPTER RULES OF ORDER FORM - Separate form that must also be submitted by June 30th of each year.

Article I: CHAPTER INFORMATION

- Section 1. Chapter Name/Location Number
 - a. Name
 - b. Location (State)
 - c. Region
 - d. Chapter Number
 - e. College/University (if applicable)
- Section 2. Chapter Service Area
- Section 3. Contact Information
 - a. Mailing address
 - b. Chapter Website URL
 - c. Chapter Email Address

Article II: CHAPTER STRUCTURE, GOVERNING BODIES

- Section 1. Executive Committee
- Section 2. Executive Board
- Section 3. Committees (Provide a listing of all committees utilized by the chapter)
 - a. Standing
 - b. Special
 - c. Ad Hoc (if applicable)

Article III: ELECTED OFFICERS AND OTHER LEADERSHIP POSITIONS

- Section 1. Duties and Responsibilities of Elected Officers
 - a. President
 - b. Vice President(s)

- c. Secretaries
 - 1. Recording
 - 2. Corresponding
- d. Financial Secretary
- e. Treasurer
- f. Assistant Treasurer (if applicable)
- g. Assistant Financial Secretary (if applicable)

Section 2. Duties and Responsibilities of Appointed Positions

(If any of these positions are elected, list them in Article III, Section 3 instead of Section 2)

- a. Parliamentarian
- b. Assistant Recording Secretary
- c. Assistant Corresponding Secretary
- d. Chaplain
- e. Sergeant-at-Arms
- f. Historian
- g. Journalist
- h. Custodian of Properties
- i. Internal Audit Committee Members
- j. Risk Management Coordinator

Section 3. Duties and Responsibilities of Elected Positions

- a. Chair and Members of Nominating Committee
- b. Chair, Internal Audit Committee
- c. Minerva Circle

Section 4. Term of Office

- a. Limits of Office
- b. Assumption of Office
- c. Appointments

Section 5. Impeachment

Section 6. Filling Vacancies

- a. Officers
- b. Other Positions
- c. Minerva Circle

Article IV: COMMITTEE DUTIES, RESPONSIBILITIES, AND MEMBERSHIP COMPOSITION (Only include committees approved by the chapter)

Section 1. Standing Committees

- a. Executive Committee
- b. Executive Board
- c. Arts and Letters
- d. Budget and Finance
- e. Fundraising (Ways and Means)

- f. Heritage and Archives
- g. Information and Communications
- h. Internal Audit
- i. Internal Development (Chapter Retreat)
- j. International Awareness and Involvement
- k. Membership Services
- l. Nominating Committee
- m. Policies and Procedures
- n. Program Planning and Development
 - 1. Economic Development
 - 2. Educational Development
 - i. Delta Academy
 - ii. Delta GEMS
 - iii. EMBODI
 - iv. Risk Management
- o. Physical and Mental Health
- p. Political Awareness and Involvement/Social Action
- q. Public Relations/Publicity
- r. Scholarship
- s. Technology

Section 2. Special Committees

- a. Elections
- b. Cotillion/Jabberwock
- c. Founders Day
- d. Homecoming
- e. May Week
- f. Minerva Circle
- g. National President's Initiatives
- h. Past Presidents' Council
- i. Statewide/Cluster Meeting Committee
- j. Step Team

Section 3. Ad Hoc Committees

Ad hoc committees are "one time only" committees, appointed for special assignments, such as Chapter Anniversary Committee.

Article V: MEETINGS

- Section 1. Executive Committee Meetings
- Section 2. Executive Board Meetings
- Section 3. Chapter Meetings
- Section 4. Committee Meetings
- Section 5. Call Meetings
- Section 6. Notifications
- Section 7. Chapter Meeting Business Attire
- Section 8. Electronic Meetings and Communication

Article VI: QUORUM

- Section 1. Definition
- Section 2. Executive Board
- Section 3. Chapter Meeting
- Section 4. Committee Meetings

Article VII: DOCUMENT RETENTION

Add reference to Chapter Management Handbook, Section II – Chapter Management: Chapter Operations, Record Retention and Destruction Policy

Article VIII: FISCAL POLICIES AND PROCEDURES

- Section 1. Fiscal Roles and Responsibilities
 - a. President
 - b. Treasurer
 - c. Financial Secretary
 - d. Other Fiscal Officers
- Section 2. National and Local Dues
 - a. National Dues
 - b. Local Dues
- Section 3. Collegiate Sorors
- Section 4. Unconsumed Dues
- Section 5. Transfer of Dues
- Section 6. Travel Policy
 - a. Travel Policy for National Convention and Regional Conference Delegates
 - Travel, lodging, registration fees, mileage, subscription events
 - b. Travel Policy for State Summits, Cluster Meetings, Delta Days and other meetings
 - Travel, lodging, registration fees, mileage, subscription events
- Section 7. Purchase Order/Reimbursement Expense Voucher
- Section 8. Method of Payment

Section 9. Unconsumed Funds: Year End Reconciliation

Section 10. Insufficient Funds or Returned Check Polity

Section 11. Fundraising

Section 12. Budgeting

- a. Committee Responsibility
- b. Timing and Process
- c. Chapter Approval

Section 13. Additional Fiscal Policies and Procedures

- a. Step Show Policy
- b. Scholarship policies, requirements and selection procedures
- c. Bonding
 - Which positions are Bonded
 - Amount

Article IX: NOMINATIONS, ELECTIONS AND VOTING

Section 1. Eligibility Criteria for holding office

Section 2. Nominations of Chapter Officers and Elected Positions

- a. Timeline and guidelines for process
- b. Nominations of the Minerva Circle
- c. Candidate guidelines for campaigning (if applicable)

Section 3. Elections

- a. Election day procedures and timeline
- b. Voting guidelines
- c. Re-balloting

Section 4. General Voting Processes

Section 5. Election Reporting

Article X: SPECIAL ELECTIONS

Section 1. Minerva Circle

Section 2. Other Special Elections (List if applicable)

Article XI: INSTALLATION OF OFFICERS

Section 1. Guidelines for selecting installing officer (*Ritual* p. 71)

Article XII: TRANSITION OF OFFICERS

Section 1. Procedures for conducting the transition process

- a. Timing
- b. Coordination

Article XIII: MEMBERSHIP INTAKE POLICIES

Section 1. Membership Intake Process

Section 2. Minerva Circle

- a. Handling Minerva Circle Members with Relatives as Applicant
- b. Filling Vacancies
- c. Frequency

Article XIV: COLLEGE OR UNIVERSITY POLICIES (COLLEGIATE CHAPTERS ONLY)

Section 1. Describe any university policies that impact chapter operations (i.e. NPHC membership, Greek Life responsibilities)

Article XV: CHAPTER PRESENTATION

Section 1: Voting and Alternate Delegate

- a. Regional Conference and National Convention
- b. State and Local Chapter Representation
- c. Order of Succession
- d. Incoming Chapter Officers

Section 2: Reimbursement

Article XVI: MEMBERSHIP VERIFICATION PROCEDURES

Section 1. Immediate verification

Section 2. Follow-up verification

Article XVII: INTERNET AND EMAIL POLICIES

Section 1. Internet Policies and Procedures

Section 2. Chapter Email Accounts

Article XVIII: ADVISORS (COLLEGIATE CHAPTERS ONLY)

Section 1. Primary Advisor

Section 2. Secondary Advisor

Section 3. Advisory Council or Team

Section 4. Selection Process

Section 5. Termination and/or Resignation Guidelines

Article XIX: COLLEGE OR UNIVERSITY POLICIES (COLLEGIATE CHAPTERS ONLY)

Section 1. Describe any university policies that impact chapter operations (e.g., NPHC membership)

Article XX: ACADEMIC REQUIREMENTS (COLLEGIATE CHAPTERS ONLY)

Section 1. Maintenance GPA

Section 2. Inactive Member Status

Article XXI: AMENDMENTS FOR RULES OF ORDER AND POLICIES AND PROCEDURES

Section 1. Procedures/timing for making changes, to whom are they submitted

Section 2. Quorum required to vote and 2/3 vote of those present and voting needed to amend

Section 3. Effective Date

Section 4. Chapter Approval Date

Article XVIII: PARLIAMENTARY AUTHORITY

Section 1. Governing Documents

Section 2. Administrative Resources and Tools

ATTACHMENTS: ALL FORMS USED BY THE CHAPTER must be given to chapter members. List and attach forms used by the chapter including but not limited to:

- Chapter Rules of Order Form
- Scholarship Application (if applicable)
- Chapter Vouchers/Check Request
- Travel Expense Report
- Chapter Press Release
- Chapter Policies and Procedures Recommendation Form
- Chapter Meeting Minutes noting amendments/approval/voting on Policies and Procedures

APPENDIX: A-14**Proposed Minerva Circle for Chapter Reactivation**

(Regional Director: Please submit to National First Vice President for concurrence prior to appointment of Assisting Sorors)

Chapter Name: _____ Location: _____

College/University (if applicable) _____

City: _____ State: _____ Zip Code: _____

Year: _____ Fall _____ Spring _____

Name of Minerva Circle Member	Current Chapter	Chapter of Initiation / Date	Rationale for Selection <i>(please state DST experience that would make each Soror a good MC member)</i>	Proposed Position on Minerva Circle	Known Relationship to Potential Applicants
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					

APPENDIX: A-15

_____ REGION PROBATIONARY PLAN FOR THE (CHAPTER NAME)

The success of Delta Sigma Theta Sorority, Inc. depends upon each individual member's commitment to improve the operations and relations of the chapter, as well as relationships sister to sister. As a requirement of this probationary plan, all financial members as determined by the number of members financial for the 20__-20__ sorority year, shall attend and actively participate in the prescribed probationary plan, during the 20__-20__ sorority year.

During the probationary period, neither the chapter, or any of its members who have been disciplined, shall participate in activities of the sorority except those rehabilitative activities and/or activities approved by the Regional Director.

The types of activities in which a chapter and its members **may be approved**, at the discretion of the Regional Director, to participate in during the probationary period are:

- △ Conducting chapter meetings and executive board meetings
- △ Participating and conducting chapter programs and service projects
- △ Preparing and submitting regional or national reports and audits
- △ Transacting any financial business for the purpose of conducting chapter business
- △ Attending statewide meetings and be seated at a regional conference and national convention
- △ University mandated activities e.g., Day of Service (**Collegiate**)
- △ Chapter members may wear paraphernalia
- △ Attend all the Delta Internal Development (DID) workshops outlined in this plan

The types of activities in which a chapter or any of its members **may not** be permitted to participate during the probationary period are:

- △ Chapter sponsored/organized social activities (e.g. Parties, step or stroll shows/competitions, etc.)
- △ This includes but is not limited to programs, step shows, stroll offs and events held by the Chapter, other Organizations, University or any NPHC activity (exception- unless mandated, in writing, by the university)
- △ Conduct membership intake

The prescribed workshops are designed to assist members in understanding the role of the chapter and the framework and structure of the Sorority. Training shall be focused on the listed development components:

- △ Code of Conduct - MANDATORY
- △ LIST ALL PRESCRIBED DIDs

The Regional Director shall oversee or designate an individual/team to oversee the progress of this Plan. The designated coordinator will work with the chapter to identify local, certified trainers

whenever possible to reduce the cost of reimbursement for trainers. The successful adherence to this Plan will determine the future status of the chapter.

APPENDIX: A-16



_____ REGION PROBATIONARY PLAN FOR (INDIVIDUAL MEMBER NAME)

The success of Delta Sigma Theta Sorority, Inc. depends upon each individual member's commitment to improve the operations and relations of the chapter, as well as relationships sister to sister. As a requirement of this probationary plan, you shall attend and actively participate in the prescribed probationary plan, during the 20__-20__ sorority year.

During the probationary period, you shall not participate in activities of the sorority except those rehabilitative activities and/or activities approved by the Regional Director.

The types of activities in which an individual member **may be approved**, at the discretion of the Regional Director to participate in during the probationary period are:

- △ Attend chapter meetings
- △ Attend chapter programs and service projects
- △ Remain on the Chapter internal email lists
- △ Attend statewide meetings, regional conference and national convention
- △ Wearing paraphernalia

The types of activities in which an individual member **may not be** permitted to participate during the probationary period are:

- △ Hold office, appointed or elected, including for membership intake. If the member currently holds an office or position, it must be relinquished
- △ Attend Executive Board meetings or committee meetings
- △ Chair any committee of the chapter or serve on any chapter committee
- △ Represent the Chapter or the Organization. This includes programs, step shows, stroll offs and events held by the Chapter, Organization, University or any NPHC activity
- △ Participate in Chapter program planning or any behind the scene planning
- △ Participate in any aspects of membership intake except attend Induction, Initiation, Sisterhood Banquet (if invited) and New Initiate Presentation

The prescribed workshops are designed to assist members in understanding the role of the chapter and the framework and structure of the Sorority. Training shall be focused on the listed development components:

- △ Code of Conduct- MANDATORY
- △ LIST ALL PRESCRIBED DIDs

The Regional Director shall oversee or designate an individual/team to oversee the progress of this Plan. The designated coordinator will work with the chapter to identify local, certified trainers whenever possible to reduce the cost of reimbursement for trainers.

The successful adherence to this Plan will determine the future status of your membership.

APPENDIX: A-17

REGION PROBATIONARY PLAN FOR (INDIVIDUAL SOROR NAME)

The success of Delta Sigma Theta Sorority, Inc. depends upon each individual member's commitment to improve the operations and relations of the chapter, as well as relationships sister to sister. As a requirement of this probationary plan, you shall attend and actively participate in the prescribed probationary plan, during the 20_____ -20___ sorority year.

During the probationary period, you shall not participate in activities of the sorority except those rehabilitative activities and/or activities approved by the Regional Director.

The types of activities in which an individual soror **may be approved**, at the discretion of the Regional Director, to participate in during the probationary period are:

- △ Wearing paraphernalia
- △ Attend chapter programs and service projects that are public events.
- △ Remain on chapter external roster

The types of activities in which an individual soror **may not be** permitted to participate during the probationary period are:

- △ Attend chapter meetings
- △ Attend chapter programs and service projects unless a public program
- △ Remain on the Chapter internal email lists.
- △ Attend statewide meetings, regional conference and national convention
- △ Hold office, appointed or elected, including for membership intake
- △ Attend Executive Board meetings or committee meetings
- △ Chair any committee of the chapter or serve on any chapter committee
- △ Represent the Chapter or the Organization. This includes programs, step shows, stroll offs and events held by the Chapter, Organization, University or any NPHC activity
- △ Participate in Chapter program planning or any behind the scene planning
- △ Participate in any aspects of membership intake except attend Induction, Initiation, Sisterhood Banquet (if invited) and New Initiate Presentation

The prescribed workshops are designed to assist members in understanding the role of the chapter and the framework and structure of the Sorority. Training shall be focused on the listed development components:

- △ Code of Conduct- MANDATORY
- △ LIST ALL PRESCRIBED DIDs

The Regional Director shall oversee or designate an individual/team to oversee the progress of this Plan. The designated coordinator will work with the chapter to identify local, certified trainers whenever possible to reduce the cost of reimbursement for trainers. The successful adherence to this Plan will determine the future status of your membership.

APPENDIX: A-18**DELTA SIGMA THETA SORORITY, INC.****A Service Sorority GRAND CHAPTER****Request Form for Excused Absence from a Regional Conference**

Any chapter that will not be represented at the national convention/regional conference must complete the **“Request Form for Excused Absence from a Regional Conference”** and forward it to National Headquarters for processing **six weeks** prior to the scheduled convention/conference. National Headquarters will forward the request to the Regional Director for her approval or disapproval. After the Regional Director’s assessment, the request will be forwarded to the National Secretary for final action. The National Secretary will send copies indicating her decision to the Regional Director, the Chapter President and National Headquarters. **A reason for the requested excused absence MUST be provided.**

Chapter Name: _____ Chapter No: _____

School/University: _____
(Collegiate Chapters)

Address: _____

City/State: _____ Zip Code: _____

Telephone: (Home) _____ (Work/Cell) _____

President: _____ Region: _____

The Chapter respectfully requests that its attendance at the national convention/regional conference in _____ on (Location) _____ be excused for the following reasons:
(Date)

Did your chapter have a delegate in attendance at either of the last two conventions/conferences?

2016	Regional Conference	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
2014	Regional Conference	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

President: _____ Advisor: _____
(Signature) (Signature-Collegiate Only)

Regional Director: _____ Approved: Yes No
(Signature)

National Secretary: _____ Approved: Yes No
(Signature)

APPENDIX: A-19**DELTA SIGMA THETA SORORITY, INC.
A Service Sorority GRAND CHAPTER****Request Form for Excused Absence from a National Convention**

Any chapter that will not be represented at the national convention/regional conference must complete the **“Request Form for Excused Absence from a National Convention”** and forward it to National Headquarters for processing **six weeks** prior to the scheduled convention/conference. National Headquarters will forward the request to the Regional Director for her approval or disapproval. After the Regional Director’s assessment, the request will be forwarded to the National Secretary for final action. The National Secretary will send copies indicating her decision to the Regional Director, the Chapter President and National Headquarters. **A reason for the requested excused absence MUST be provided.**

Chapter Name: _____ Chapter No: _____

School/University: _____
(Collegiate Chapters)

Address: _____

City/State: _____ Zip Code: _____

Telephone: (Home) _____ (Work/Cell) _____

President: _____ Region: _____

The Chapter respectfully requests that its attendance at the national convention/regional conference in (Location) _____ on (Date) _____ be excused for the following reasons:

Did your chapter have a delegate in attendance at either of the last two conventions/conferences?

2017 National Convention Yes No

2015 National Convention

President: _____ Advisor: _____

Regional Director: (Signature) Approved: Yes

National Secretary: (Signature) Approved: Yes

APPENDIX: A-20

VERIFICATION OF MEMBERSHIP FOR VISITING SORORS PROTOCOL

Frequently, sorors want to attend meetings in a new community and want to affiliate with that community's chapter. Upon their arrival, they often do not have a membership card or other documents needed, in their immediate possession to verify their membership in Delta Sigma Theta Sorority, Inc. At times, some chapters have been reluctant or negligent in requiring sufficient proof of membership.

As a result, an on-site verification of membership process has been devised and it is mandatory that it is used by all chapters before granting admittance to chapter meetings and to determine if a soror is in good standing with the organization. Without proper verification of membership (membership card, membership certificate, or letter of verification), a visitor should *not* be admitted.

The following must be completed when conducting on-site verifications of membership:

1. Proof of Membership

Membership card; membership certificate; verification via the Red Zone, or Verification of Membership Letter completed by National Headquarters (allow at least three business days of receipt).

OR

2. Vouching for Sorors/Members

Vouching for a person, is when a member of the chapter can attest to the veracity of the visitor's claim of membership. Such attestation must be based on knowledge of the visitor's initiation or past activities with Delta Sigma Theta Sorority, Incorporated.

AND

3. Verification of Good Standing

Access the list of all sorors/members who have been placed on suspension, probation* or have been expelled from the organization. This information is consistently updated on the Home Page of the official website (Membership Tab).

NOTE: To alleviate disruption at the entrance, the Chapter President should be notified in advance and proof of membership should be provided **at least five to seven business days** prior to the meeting, ceremony, etc. To secure the contact information for the Chapter President, please visit the official website (www.deltasigmatheta.org) and click on the **Chapter Locator**.

(*) Sorors on probation may be granted admittance only if part of a Rehabilitation Plan prescribed by the Regional Director. The soror is required to have a copy in hand for presentation at the door.

ACKNOWLEDGEMENTS

CHAPTER MANAGEMENT HANDBOOK 2018 REVISION

NATIONAL SCHOLARSHIP AND STANDARDS COMMITTEE 2014 - 2015

**Beverly E. Smith, National First Vice President and
Chair, National Scholarship and Standards Committee**

Dr. Paulette C. Walker, National President
Brittany Blackwell, National Second Vice President
Jacqueline A. Dillard, Central Region
Rev. Dr. Deborah L Stapleton, Eastern Region
Tracy R. Aikens, Farwest Region
Kimberly Offord, Midwest Region
Juanita B. Massenburg, South Atlantic Region
Joanell Lawson, Southern Region
Eula Woodberry, Southwest Region
Yvette Bean, Collegiate Member

NATIONAL SCHOLARSHIP AND STANDARDS COMMITTEE 2015 -2017

**Beverly E. Smith, National First Vice President and
Chair, National Scholarship and Standards Committee**

Dr. Paulette C. Walker, National President
Taylor McCain, National Second Vice President
Felicia C. Echols, Central Region
Traci Birckhead, Eastern Region
Gwendolyn Mosley, Farwest Region
Kimberly Offord, Midwest Region
Lisa S. King, South Atlantic Region
Joanell Lawson, Southern Region
Eula Woodberry, Southwest Region
Clennette Reid, Collegiate Member

NATIONAL SCHOLARSHIP AND STANDARDS COMMITTEE 2017 – 2018

**Cheryl A. Hickmon, National First Vice President and
Chair, National Scholarship and Standards Committee**

Beverly E. Smith, National President
Jaria Martin, National Second Vice President
Felicia C. Echols, Central Region
Traci Birckhead, Eastern Region
Gwendolyn Mosley, Farwest Region
Kimberly Offord, Midwest Region
Lisa S. King, South Atlantic Region
Joanell Lawson, Southern Region
Eula Woodberry, Southwest Region
Jaleah Rutledge, Collegiate Member

Headquarters Staff Liaisons

Deirdre Z. Shoulars, Director, Membership Department
Shontel Rogers Hawkins, Coordinator, Membership Department
Linora Carr, Membership Intake Specialist

NATIONAL DOCUMENTS REVIEW AND MANAGEMENT COMMITTEE 2016-2017

Sandra K. Parker, Co-Chair

Carol E. Ware, Co-Chair

Louise Alexander, Central Region
Arvis Bridges-Epps, South Atlantic Region
Angela Brown, Farwest Region
Cheryl Cooper Boyd, Midwest Region
Debbie Brooks, Midwest Region
Doris Peters, Farwest Region
Berthenia Rose Jackson, Southern Region
Evelyn White, South Atlantic Region
Y. Jean Whitley, Southwest Region
Tracy L.F. Worley, Eastern Region

2017 – 2019

Sandra K. Parker, Chair

Cheryl Cooper Boyd, Midwest Region
Angela Brown, Farwest Region
Torey Tolson, Midwest Region
Berthenia Rose Jackson, Southern Region
Tracy L.F. Worley, Eastern Region

Headquarters Staff Liaison

Shontel Rogers Hawkins, Coordinator, Membership Department