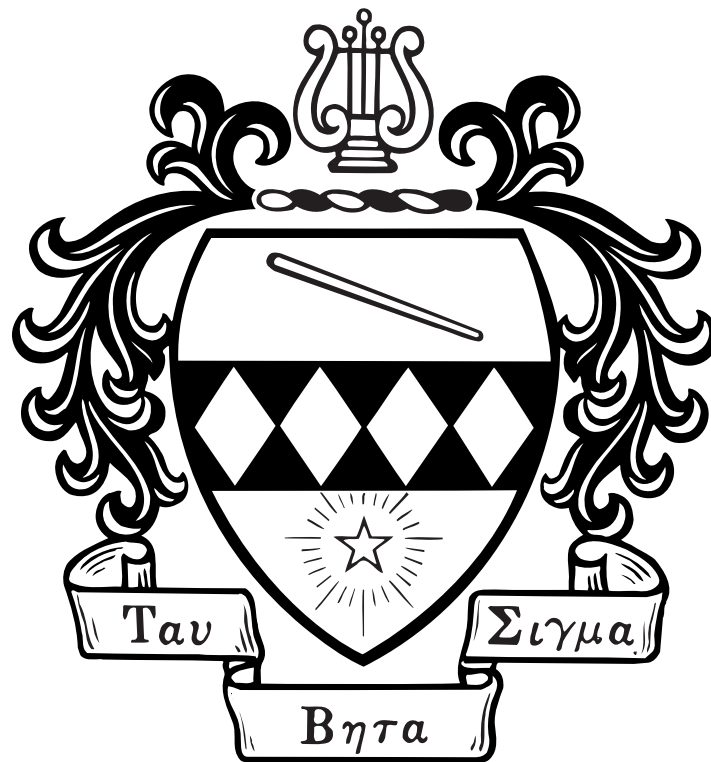


OFFICIAL

# CHAPTER OPERATIONS GUIDEBOOK



---

**TAU BETA SIGMA NATIONAL HONORARY BAND SORORITY**

**2022-2023 EDITION**

---

KAPPA KAPPA PSI & TAU BETA SIGMA NATIONAL HEADQUARTERS  
PO BOX 849 • STILLWATER, OK • 74076-0849  
TELEPHONE: (405) 372-2333 • FAX: (405) 372-2363 • KKYTBS@KKYTBS.ORG  
WWW.TBSIGMA.ORG

# Table of Contents

<b>Foreword</b> .....	1
<b>Introduction Letter</b> .....	2
<b>National Headquarters</b> .....	3
<b>National Leadership Team</b> .....	4
<b>Chapter Health and Safety</b> .....	6
<b>Chapter Paperwork</b> .....	7
Chapter Paperwork Checklist & Tips on Completing .....	9
<b>Director of Bands</b> .....	11
<b>Chapter Sponsor</b> .....	12
<b>President</b> .....	13
<b>Vice President for Membership</b> .....	14
Membership Education Plan .....	16
Membership Education Plan Worksheet.....	19
<b>Vice President for Service and Special Projects</b> .....	21
Focus on Five Liaison Job Description .....	23
Focus on Five Campaign.....	23
Event Planning Worksheet.....	24
Examples of Service/Special Projects .....	26
<b>Secretary</b> .....	27
<b>Treasurer</b> .....	29
Chapter Budget Template (Annotated) .....	31
Annotated Money Ledger .....	35
Fundraising .....	36
<b>Miscellaneous Chapter Positions</b> .....	38
<b>Online Chapter Operations</b> .....	39
<b>Committees &amp; Committee Meetings</b> .....	41
<b>Officer Transition</b> .....	42
Officer Transition Worksheet.....	43
<b>Sorority Policies</b> .....	45
Chapter Statuses & Membership Statuses .....	46
Advocacy Efforts.....	46
Trademark Policy.....	46
Branding.....	46
Jewelry & Merchandise.....	46
<b>IRS &amp; Chapter EIN</b> .....	47

Frequently Asked Questions for Chapter Operations.....	48
Appendix I: Minutes Template.....	50
Appendix II: Chapter Budget Template .....	51

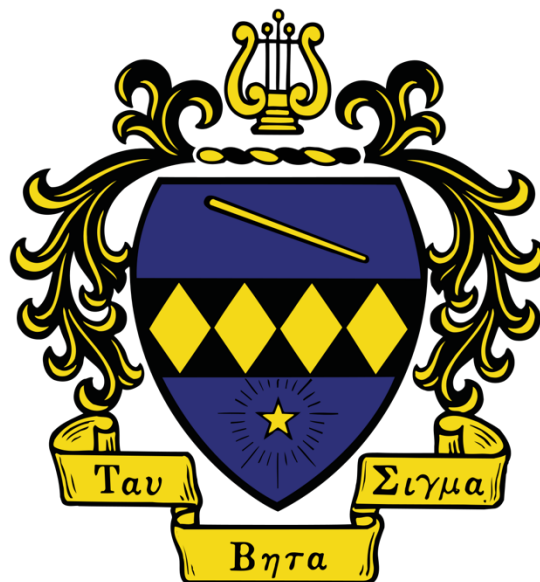
# Foreword

The CHAPTER OPERATIONS GUIDEBOOK was developed to assist Tau Beta Sigma members with universal chapter operations. The information and resources provided by this guidebook are not all-encompassing but should be referenced often throughout the school year as chapters set goals, recruit and educate new members, and plan projects. Newly installed Chapter Officers should meet as an executive team with their Chapter Sponsor and/or Director of Bands to read through and discuss the materials contained in this guidebook. However, all chapter members are encouraged to read through this.

The National Leadership Team encourages all chapter members to retain a hard copy or electronic copy of this guidebook to give everyone an equal understanding of chapter operations. Sponsors, Directors of Bands, District Officers, Chapter Visitation Assistants, District Counselors, University Student Affairs professionals, etc. may also find the Chapter Operations Guidebook helpful and should retain a copy for their own reference.

This version of the Chapter Operations Guidebook has been updated as of June 2022 and is for use during the 2022-2023 Academic Year. Previous editions should be discarded.

Questions about the information contained in this guidebook should be sent to the National Leadership Team at [council@tbsigma.org](mailto:council@tbsigma.org).



# Introduction Letter

Dear Chapter Members,

The National Leadership Team of Tau Beta Sigma is excited to see the work that you do with your chapter. Chapter Operations need deliberate, ambitious, and careful planning to ensure that everything runs smoothly. We will never lie and tell you that running your chapter will be easy, but what you will gain out of running meetings, planning events, and goal setting will be valuable tools that you will use after graduation.

It is always exciting to be a new member in your chapter, to be newly elected to an office, or to be in your first planning meeting for your chapter. While we hope that this excitement will stay throughout your time in the chapter, we know that things may get frustrating. This guidebook is not an exhaustive list of how to run your chapter and is not intended to be a step-by-step operations guide from start to finish. You will find worksheets, questions to ponder, lists of project ideas, and helpful hints throughout this document. You may find yourself asking why you signed up for this kind of responsibility - please know that you have the complete support of the National Leadership Team! As you read through this guidebook, always feel free to reach out to National Leadership Team members for clarification and support.

Tau Beta Sigma has built a vast support system for our chapters. Your Sponsor and Director of Bands provide support surrounding your local chapter's operations and its connection to your bands and campus. Your District Council, Counselors, and Chapter Visitation Assistants provide support surrounding your chapter's operations and its connection to your District and National expectations. The National Council provides support surrounding your chapter's operations and its connection to the National expectations of the Sorority.

As you can see, on every level, your chapter is well supported - if you need help, ask! Asking for help is a proactive approach and ensures your chapter operations continue to function correctly. Your District Councils, Counselors, CVAs, and National Council members are willing and available to provide your chapter with any and all support that you may need. Never be afraid to ask for help!

As mentioned in the Foreword, we encourage you to have your members and your Sponsor read through this guidebook to understand the full operations of a chapter. We also encourage you to complete the interactive forms and worksheets, as they may prove useful to your chapter throughout the year. Should any issues in your chapter arise, please reach out to the National Leadership Team; we would be happy to talk through any questions you may have.

With Love in the Bond,

The National Leadership Team of Tau Beta Sigma

Email: [council@tbsigma.org](mailto:council@tbsigma.org)

# National Headquarters

Tau Beta Sigma and Kappa Kappa Psi employ a staff to handle the day-to-day operations of the Sorority and Fraternity.

Our National Headquarters is currently located at Stillwater Station in Stillwater, OK.

## National Headquarters Contact Information:

USPS: PO Box 849  
Stillwater, OK 74076-0849  
UPS/FedEx: 215 E 9th Avenue  
Stillwater, OK 74074-4704  
Phone: 405-372-2333  
Fax: 405-372-2363

## National Executive Director, Steve Nelson, [nelson@kkytbs.org](mailto:nelson@kkytbs.org)

The National Executive Director handles the day-to-day business operations of the Sorority and Fraternity. The Executive Director is the point of contact for each Director of Bands on our campuses. They are in charge of ensuring that the Sorority and Fraternity has the proper professional resources to operate successfully.

## National Accounting Manager, Di Spiva, [spiva@kkytbs.org](mailto:spiva@kkytbs.org)

The National Headquarters Office Manager & Accountant is the executive assistant to the National Executive Director. They are the bookkeeper for National Headquarters including preparing financial reports and payroll operations.

## National Alumni & Development Manager, Aaron Moore, [moore@kkytbs.org](mailto:moore@kkytbs.org)

The National Alumni & Development Manager is responsible for overseeing the alumni database, and our historical records of the Sorority and Fraternity. As part of maintaining the historical records, they are responsible for continued preservation of the documents held at National Headquarters, including chapter petitioning documents.

## National Media & Publications Manager, TBA, [podium@kkytbs.org](mailto:podium@kkytbs.org)

The National Media & Publications Manager is responsible for publishing the semi-annual editions of The Podium. They oversee the Sorority's branding, advertisements, books, and articles for publishing. They also are the webmaster of the Sorority and maintain the Sorority's website.

## National Membership Services Coordinator, Debbie Morris, [morris@kkytbs.org](mailto:morris@kkytbs.org)

The National Membership Services Coordinator is responsible for maintaining the membership database for the Sorority and Fraternity. They are the person that prepares our membership shingles and mails those out to chapters. They are in charge of all accounts receivable and creates the Chapter Status Reports and District Allocation Report.

## National Membership and Expansion Coordinator, TJ Tooley, [tooley@kkytbs.org](mailto:tooley@kkytbs.org)

The National Membership and Expansion Coordinator works closely with the National VP for Membership & Expansion to coordinate the development of chapters and colonies of the Sorority. They work with chapters on disciplinary status, review chapter constitutions and membership education plans.

## National Events Coordinator, Lisa Croston, [croston@kkytbs.org](mailto:croston@kkytbs.org)

The National Events Coordinator works with the National Executive Director, and certain members of the National Leadership Team, in the planning and operation of national conventions, district conventions and other national meetings.

# National Leadership Team

The National Constitution of Tau Beta Sigma has official descriptions of members of the National Leadership Team; however, this page gives a short summary of each position. Each member of the National Leadership Team is a volunteer of the Sorority and receives no payment for their time and services.

## **National President**

### ***Section 3.205 of the National Constitution***

The National President is the official representative of Tau Beta Sigma. This office appoints and sits on all committees as a non-voting member, presides over official meetings of Tau Beta Sigma, and coordinates with Kappa Kappa Psi, National Headquarters, District Counselors, Chapter Visitation Assistants, and the Tau Beta Sigma Alumni Association. The National President is also an ex-officio member of the Board of Trustees. The National President is elected by the delegation at the biennial National Conventions.

## **National VP for Membership & Expansion**

### ***Section 3.206 of the National Constitution***

The VP for Membership and Expansion is the Expansion and Retention officer of Tau Beta Sigma. This office is responsible for the coordination and solicitation of new chapters. The VP for Membership and Expansion monitors progress of chapters on Observation, Probation, Administrative Hold, and Suspension. The National VP for Membership and Expansion is elected by the delegation at the biennial National Conventions.

## **National VP for Professional Relations**

### ***Section 3.209 of the National Constitution***

The VP for Professional Relations is the point of contact for the music/band profession for the Sorority. This office is responsible for the logistics related to the National Intercollegiate Band, including assisting the Board of Trustees with selecting composers and conductors. This officer coordinates band director outreach regarding chapter operations and chapter statuses. The VP for Professional Relations is appointed by the National President.

## **National VP for Special Projects**

### ***Section 3.207 of the National Constitution***

The VP for Special Projects is the programming officer of Tau Beta Sigma. This office is responsible for running campaigns that support the National Programs of the Sorority and provides technical assistance to chapters regarding the National Programs. The VP for Special Projects coordinates the Women in Music Speakers for District and National Conventions. The National VP for Special Projects is elected by the delegation at the biennial National Conventions.

## **National VP for Communication & Recognition**

### ***Section 3.208 of the National Constitution***

The VP for Communication and Recognition is the recording and credentials officer of Tau Beta Sigma. This office is responsible for the documentation of official business of the Sorority and facilitating official communication to the Tau Beta Sigma membership. This office also facilitates the awards given by the National Chapter of Tau Beta Sigma. The National VP for Communication & Recognition is elected by the delegation at the biennial National Conventions.

## **Board of Trustees**

### ***Section II of the National Constitution***

The Board of Trustees is responsible for the financial wellbeing of the Sorority and as such maintains the Sorority's Trust. The Board also makes financial, legal, and policy decisions to ensure our financial sustainability and legacy of the Sorority. The Board of Trustees members are elected by Life Members of the Sorority.

**District Counselor*****Section 5.2 of the  
National Constitution***

The District Counselor is the advisor and Administrative Representative for the District for which they are responsible. They are a primary contact for day-to-day operations of chapters who need assistance, and they directly oversee the operations of the District Council. District Counselors are appointed by the National President.

**Chapter Visitation Assistant*****Section 5.3 of the  
National Constitution***

The Chapter Visitation Assistant is a representative of the National Leadership Team who visits chapters to provide workshops to promote Sorority, professional, and personal growth. They also ensure compliance with Sorority Policies. Chapter Visitation Assistants are appointed by the National President.



# Chapter Health and Safety

The health and safety of chapter members is of the utmost importance, to ensure the continued success in providing service to college and university band programs. At every turn, chapters should make it their mission to make sure that all members are able to serve in a safe environment. It is recommended that all chapters take time each semester to review the projects they are executing and put in every necessary precaution to ensure the health and safety of the members who will be engaging in the work to bring the projects to completion. Since 2020, the National Council has been aware that each campus has developed their own set of protocols when it comes to the health and safety of their students. We ask that all of our chapters follow the advice of public health experts and any guidance given at the campus, local, state, and federal levels.

## Additional Tips for Safe Chapter Operations:

### Chapter Meeting Format:

When planning for the semester, chapters are encouraged to build in an online option or consider hosting meetings on a hybrid schedule of some meetings being in person, while others are held online. This ensures that everyone has the opportunity to still join in and have access to chapter events, meetings, and activities, even if they do not feel well enough to attend in person. For more information on how to host virtual meetings, refer to the [Online Chapter Operations](#) section of this guidebook.

### Resources for Instrument Care and Cleaning:

- [NFHS Cleaning Guidelines \(For Covid-19 and Otherwise\)](#)
- [Progressive Music Safety Tips For Musicians \(For Covid-19 and Otherwise\)](#)
- [NEMC Musical Instrument Safe Handling and Cleaning Guidance](#)

We strongly advise chapters to take extra health precautions when executing service activities such as assembling chairs and stands for rehearsals, instrument cleaning **after** distribution, sanitizing surfaces such as stands and chairs, or hemming/repairing uniforms **after** distribution. There may be a higher risk of transmission of germs with these activities, due to multiple people touching the same surfaces.

If you have any questions about any activities or would like to talk about how to mitigate risk in your, please feel free to email [healthandsafety@tbsigma.org](mailto:healthandsafety@tbsigma.org) and [healthandsafety@kkpsi.org](mailto:healthandsafety@kkpsi.org).

# Chapter Paperwork

To remain in compliance with the National Sorority, every chapter has to complete paperwork to report on membership updates and chapter activities throughout the year. The next two pages will provide an overview of each required piece of paperwork, including deadlines for submission and descriptions of the forms.

Golden Rule of Paperwork: **DO NOT EVER SEND CASH IN THE MAIL. YOU CANNOT RECOVER LOST CASH.**

## Chapter Personnel Report

**Due September 30th**

**Financial Obligation: \$100 Chapter Fee + \$115 Membership Fee per Person**

This is the document that designates who is in your chapter. It tells the Sorority who is Active, Conditional, and Inactive at the beginning of the year. Failure to complete this paperwork will result in a 25% Late Fee and your chapter being placed on Probation.

## Chapter Personnel Update

**Due 30 Days After Membership Changes**

This is the paperwork that documents any changes to your chapter membership. If a person chooses to be Conditional for a semester, or if an Inactive member who is still enrolled at the University would like to reactivate, this is the paperwork to file.

## Membership Candidate Registration

**Due 7 Days after First Degree**

This paperwork is used to note who are Membership Candidates and that they have gone through First Degree.

## Initiate Registration

**Due 30 Days after Third Degree**

**Financial Obligation: \$135 Initiate Fee per person**

This is the paperwork to record who has been initiated into your chapter. Failure to file this paperwork on time will result in a 25% Late Fee.

## Fall Activity Report

**Due December 1st**

This is the paperwork to describe the activities and accomplishments your chapter completed throughout the Fall Semester (or between August and December, if your chapter is on the quarter system). You should be as detailed as possible when completing this paperwork and answer the questions fully.

## Chapter Summary Report

**Due June 1st**

This is the paperwork to discuss your chapter's operations throughout the year, with a specific focus on operations, activities, and accomplishments from January to June. You should be as detailed as possible with your responses to questions and answer all questions fully.

## Honorary Registration

**Due 30 Days after Honorary Initiation**

**Financial Obligation: \$135 Honorary Fee per person**

This is the paperwork to register your chapter's new Honorary Members. Failure to complete this paperwork on-time will result in a 25% Late Fee.

## Graduating Seniors Report

**Due 30 Days after Graduation**

This is paperwork to note who in your chapter has graduated from your college/university for the given semester.

## **Officer and Chapter Update**

### ***Due 30 Days after Elections***

This is the paperwork to update the Sorority on your new officers after you hold elections.

## Chapter Paperwork Checklist & Tips on Completing

### Paperwork Success Hints:

- Use this checklist to keep track of the steps of paperwork approval. Add the date of each benchmark into the appropriate box.
- Chapter Paperwork is **not** considered completed until it is listed as **Transaction Completed**.
- When mailing in dues and the signature form use **Certified Mailing with Tracking**, as it allows you to track the letter to Headquarters and requires a delivery signature. Put the Tracking Number in the Comments section on OMRS.
- If an emergency occurs (hurricane, flash flooding, tornado, etc.) which causes a delay in getting paperwork done, please call National Headquarters and **speak to the Executive Director** about paperwork extension options.
- Membership and Initiation Dues and the accompanying signature form must be **POSTMARKED** before the due date.
- **Do not** have payment plans that go past the due date for the Chapter Personnel Report or Initiate Registration.
- Use the online dues payment service in lieu of mailing dues: <https://www.tbsigma.org/tbs-form-payment-gateway/>

Paperwork	Start Date	Submitted to Sponsor	Sponsor Approved	DOB Approved	Dues and Form Sent to NHQ	Received by NHQ	Transaction Completed
Chapter Personnel Report							
Membership Candidate Registration							
Initiate Registration							
Fall Activity Report					N/A	N/A	
Chapter Personnel Update							
Membership Candidate Registration							
Initiate Registration							
Chapter Summary Report					N/A	N/A	
Honorary Registration							
Graduating Seniors Report					N/A	N/A	

Officer and Chapter Update					N/A	N/A	
-------------------------------	--	--	--	--	-----	-----	--

# Director of Bands

The Chapter operates under the “supreme authority” of the Director of Bands (DOB). Our chapters exist to provide quality service to bands on college campuses, which means our operations support the DOB’s bands. It is important that the Director of Bands remains involved with the chapter throughout the year. That does not mean that DOBs need to be at every meeting or every Ritual, but regular check-ins with chapter leadership is always important. The Director of Bands has final approval of all paperwork filed by the Chapter, and the official date of submission typically occurs when the DOB approves paperwork.

Each university has a different name for its Director of Bands position. It could be named Marching Band Director, Director of Instrumental Ensembles, Director of Wind Studies, or Director of Athletic Bands. Either way, your DOB is on the faculty of your university and has a direct link to the bigger music department on your campus.

**From the National Constitution** 6.101 Chapters of Tau Beta Sigma Sorority shall be established throughout the general jurisdiction of the Sorority at academically accredited colleges and universities and shall operate under the supreme authority of the Director of Bands. The Director of Bands is responsible for governing and monitoring the daily activities and affairs of the local chapter. The Director of Bands may choose to appoint an individual to serve in the role of chapter sponsor. The National Council shall recognize the authority of the chapter sponsor appointed by the Director of Bands; however, the Director of Bands has ultimate authority in matters pertaining to the chapter. The sponsor and Director of Bands are ex officio members of all chapter committees.

# Chapter Sponsor

The Chapter Sponsor is appointed by the Director of Bands and is the liaison between the chapter and the University music/band faculty. The Sponsor acts as an advisor to members of the chapter concerning the chapter's operations and activities. It is imperative that the Sponsor understands and can clearly explain all university regulations and policies, as well as all National Sorority policies. Sponsors need to understand that, depending on local campus regulations, they may be legally liable for actions of the chapter.

Some campuses require that Sponsors are employees of the University. While the Sorority does not mandate this, the Sorority does recommend that Sponsors be employees of the University where the chapter is located. Sponsors do not need to be alumni members of the chapter. Sponsors should create connections with the District Counselors, the assigned CVA, and the National Council.

## **Key Areas of Responsibility for a Director of Bands and Sponsor:**

### *Chapter Operations*

- Attend meetings and functions of the chapter.
- Work closely with the Chapter President and other officers.
- Be aware of all activities: social, ritual, service, membership education, and prospective member recruitment.
- Review the chapter financial statements on a regular basis.
- Review and approve paperwork or provide feedback on needed edits. *Membership Education Plan*
- Approve dates of prospective member recruitment.
- Review and approve Membership Education activities.
- Advise in the membership selection process.
- Attend rituals.

### *Goals*

- Assist in setting annual and long-term goals for the chapter with chapter officers and members.

# President

**From the National Constitution 6.206** The President shall preside at all meetings of the chapter and shall be a nonvoting member of all chapter committees which shall be appointed by the President. The President shall sign all checks for monies disbursed and shall sign all contracts and other instruments of business incurred by the chapter. The President shall be responsible for filing the Fall Activity Report and Chapter Summary Report to the National Headquarters. In addition, the President shall be designated as the official representative of the chapter whenever such representation shall be required.

The Chapter President is the highest elected official of the chapter. You are the person responsible for ensuring that your chapter is running as smoothly as possible and making sure your chapter is in compliance with all University and Sorority policies. You are responsible for ensuring your Chapter's paperwork is completed and submitted to the Online Membership Reporting System (OMRS) on time. Use the checklist on Page 7 to assist in submitting paperwork.

It is your job to ensure your chapter remains a valuable asset to your band program, your university, the District, and the National Organization. It is incredibly important that your chapter remains involved with all of those levels of your institution and the Sorority.

Your leadership qualities and abilities have brought you to becoming Chapter President. Throughout your term, you will be tested in many different ways -- your organization skills, time management, patience, emotional poise, and communication skills. At no point should you feel that you cannot ask for help. Even if an issue seems small, you can always feel free to talk with your Sponsor, DOB, District Council, or District Counselors. Leadership is shown when you work collaboratively with others to solve problems.

**Note: Your Chapter President should not be the same person as your 1st Vice President or Treasurer.**

## Key Areas of Responsibility

### *Chapter Operations*

- Preside at chapter meetings, using Parliamentary Procedure.
- Appoint all standing and special committees.
- Be an ex-officio member of all committees and attend as many meetings as possible.
- Sign all contracts and other instruments of business incurred by chapter.
- Sign all checks written by the chapter. Your chapter should require two signatures on checks -- yours and your Treasurer's.
- Schedule a Visit with your Chapter Visitation Assistant.
- Coordinate and complete Sorority and University Paperwork.

### *Goal Setting for Your Chapter*

- Stick to SMART Goals (Specific, Measurable, Attainable, Relevant, and Time-Bound)
- Perform a needs assessment with your band and chapter.
- Derive goals and action steps from those identified needs.
- Create benchmarks to both evaluate goals and ensure you are on track.
- Do not overwhelm yourself or your chapter.

### *Leadership*

- Be present as much as you can, but do not shirk your duties to school and band.
- Set boundaries for when you will handle business issues.
- Know and enforce all University and Sorority policies.
- Regularly check in with members to ensure that the chapter is running as best as possible.
- Field concerns from members, but **not** be the chapter fixer. Provide honest but respectful feedback to members when they ask for it.
- Identify leadership opportunities for members and assist them in attaining their goals.
- Regularly communicate with your Sponsor, DOB, Chapter Officers, District Officers, and National Leadership Team members and gather feedback on your chapter



# Vice President for Membership

**From the National Constitution 6.207** The Vice President shall, in the absence of the President, preside at meetings of the chapter and shall advance the purpose of the Sorority as stated in the Preamble of the Constitution by promoting the work of the chapter as performed by its several officers and committees. The Vice President shall be responsible for the education, training, and initiation of all members of the chapter.

The office of Vice President for Membership is an important role in chapters as this person is charged with the recruitment, retention, and upkeep of your chapter's membership. If your chapter has more than one Vice President, the VP for Membership is your chapter's **First Vice President**, meaning that you may even preside over a chapter meeting once throughout your term. The job has a lot of responsibility, but all are achievable.

**Note:** Your chapter's **First Vice President** should not be the same person as your **President** or **Treasurer**.

Tau Beta Sigma has adopted *Overture* as our national curriculum. This curriculum is used in every chapter across the nation and provides an equal education to chapter members while still allowing chapters to have their own personality reflected in the membership education process. Your chapter **must** use *Overture* as your chapter's membership education program. To access all *Overture* resources, please visit the [Overture landing page](#), as well as the [Overture Facebook page](#). Please email [overture@tbsigma.org](mailto:overture@tbsigma.org) with any questions.

## Planning Membership Education:

Before your Membership Education classes can begin (even before recruitment can begin), you must submit your updated Membership Education Plan (MEP) to your District Counselor by the date designated by them. They will approve it or send it back to you with edits and thoughts on how to better shape your MEP.

A majority of Membership Education is about balance for your Membership Candidates and yourself, as the Education Coordinator. *Overture* has **9 Modules (0-8)** arranged in a deliberate order, so you should not plan to mix up the modules. The National Leadership Team requires that your MEP uses a calendar but be sure to leave enough room to adjust in case your candidates have conflicts. Later on in this Guidebook will be the type of information you should think about when starting to work on your Membership Education Plan, as well as a worksheet with the exact prompts asked about your Membership Education Plan.

## Continuing Membership Education:

Learning about the Sorority should not end on Initiation Day. There are a number of ways in which chapters can continue to provide educational opportunities to members. The overall structure of *Overture* makes this possible. Chapters can review the Learning Activities built into the structure of *Overture* by executing them during chapter meetings or as a part of sisterhood enrichment activities.

## Key Areas of Responsibility

### *Chapter Operations:*

- Preside at chapter meetings in the absence of the Chapter President.
- Know and be able to use parliamentary procedure.
- Revise and submit your chapter Membership Education Plan to the District Counselors for approval.

### *Ritual<sup>1</sup>*

- Oversee the upkeep and safety of all chapter Ritual and Regalia materials.
- Coordinate the practice and performance of all chapter Rituals.

### *Membership Education*

- Advertise & hold recruitment events.
- Understand fully all Risk Management policies that the Sorority has.

<sup>1</sup> If your chapter is big enough, you can outsource these roles to a Ritual and Regalia Chair and/or Committee.

- Learn and understand the policies on hazing, controlled substances, and discrimination set by your school and your state.
- Create an education plan for your candidates that follows the outline made by *Overture*.
- Attend and supervise all Membership Education Program meetings and activities.
- Report prospective member progress to the chapter regularly.
- Oversee the continuing membership education of active members.

# Membership Education Plan

## Recruitment

Chapters need to have a steady flow of new members to be able to sustain themselves and their projects. This part intends to assist chapters in organizing thoughts on how to conduct successful recruitment and education. The recruitment period is commonly known as “rush,” however we encourage the use of the word “recruitment” rather than “rush.”

Tau Beta Sigma expressly prohibits discrimination by any Chapter or individual. As such, your recruitment events should be targeted to all people in your campus' bands. This means your events should be culturally competent and not targeted towards people of one gender. For example, a makeover recruitment event may not appear to be welcoming to all genders. However, inviting prospective members to join your chapter in completing a Crescendo project with a local high school could appeal to all genders and interested individuals, and showcases the ideals of Tau Beta Sigma.

Perception is key during recruitment, and an agreed upon strategy is key as well. Your chapter will want to show the best version of itself throughout recruitment, and may want to coordinate any important activities, such as wearing your chapter shirt on a specific day. If your chapter identifies a certain person you want to become a Membership Candidate, have a coordinated plan on how you can personally recruit that person. Be sure to not overwhelm that person with multiple people approaching them over and over again.

## Connect Service to Your Recruitment Strategy

The Sorority is primarily a service-based organization. Your recruitment activities should involve service to avoid giving false impressions to potential candidates. It is important that potential candidates understand what they are getting involved with.

### Questions to Consider When Planning Recruitment:

- How long will you have your recruitment period?
- How many recruitment events will your chapter hold?
- Do you need to reserve space for the recruitment events?
- Are your recruitment events appealing to all audiences in your bands?
- How can you start your recruitment strategy during Band Camp?
- Are there requirements to become a Membership Candidate imposed by your University and/or DOB?
  - For example, do MCs have to be Sophomores? Are there GPA requirements?

## Bids

Part of your recruitment strategy should include the formal invitation commonly known as the bid process. It is important to carefully think about how your bids will be issued. It is also extremely important to carefully think about how you will handle notifying people who did not receive bids. In both situations, the form of communicating this information should be identical. You should always be sure to notify the people who did not receive a bid and be open to discussing why a bid was not given.

### Questions to Consider When Planning Bids:

- How many people do you plan to bring into the chapter?
- Will you interview candidates prior to deciding on bids?
- Will you issue a bid to a person who has not attended any recruitment events?
- How will bids be decided on?
- How will you notify people who received bids and who did not?

## Teaching Your Candidates

Although all chapters should be using *Overture* to educate your Membership Candidates, the overall structure of *Overture* is designed to meet several different styles of educational needs. Some people benefit from learning on their own, some people benefit from having another person teach them in a classroom, some people may need other forms of help. It is recommended that you assess the needs of

your candidates and create plans that serve each of their interests. That's not to say you should have many different versions of each lesson but make small modifications as you see fit to serve everyone's needs.

**If one of your candidates needs accommodations related to a documented disability**, we recommend that you work with that candidate, your Sponsor, and/or District Counselor to create a plan that affords the candidate to work through the Membership Education process in a way that works for that candidate.

### Choosing Activities & Assessing Your Candidates

Throughout each Module, you will want to plan out an activity that supplements the written knowledge that your candidates are learning. The *Overture* Handbook has activities that you choose from, or you can create your own activities and submit them for approval. You will want to build those activities into your plan and submit them with your plan. This includes knowing what materials you may need to successfully run these activities.

Tau Beta Sigma does not currently have a stance on how assessments work throughout *Overture*, however we strongly discourage having tests or quizzes. Tests and quizzes typically only assess an ability to memorize rather than a true comprehension of material. Assessments should be reflection based, which can better show comprehension/analysis and do not rely on candidates knowing our mission, vision, purposes, qualities, factors, leadership team names, and chapters word-for-word.

### Calendar

Your membership candidates have the right to know the types of events that they will be at. We recommend giving a list of all events you plan to hold, including lessons, to your candidates at the beginning of the process. It is important and required that candidates are well informed of the time commitment for which they are signing up.

For example, a list should include:

**Event:** First Degree

**Date & Time:** September 20, 2022 at 8:30PM

**Length of Event:** One Hour, with an optional group dinner afterwards

**Location:** University Band Room

**Description:** This is an official ritual of Tau Beta Sigma where candidates are introduced to the Sorority.

### Additional Events & Probates/New Member Presentation Shows

We encourage chapters to add their unique identity into the curriculum through the use of additional events, as well as participating in Probates/New Member Presentation Shows at your institution. However, it **must** be included (including detailed plans/scripts) in your proposed MEP. If a script will be developed throughout the semester, you must submit it when it is ready.

### Membership Education Roles

While the VP for Membership is the coordinator of membership education, they do not always have to be the sole educator. You can find creative ways to have other members of your chapter teach your membership candidates. For example, your Ritual and Regalia Chairperson could be the person to conduct the Ritual recap conversations, or your Historian could be the person to teach History lessons. That said, if you want to be the person that is solely responsible for teaching your candidates, that is possible, but always consider where you can share and delegate tasks.

### Bigs and Littles

The Big Sister's role is to advise and advocate for a Membership Candidate. These are questions to consider when considering how your Big Sisters are involved with your Membership Education Plan:

- Do you have a priority list? How is that priority list created?
- How many Big Sister check-ins should you plan for throughout the semester?
- Are there financial obligations for being a Big Sister? How can you mitigate those obligations?
- What happens when there are significant conflicts for Big/Little combinations?
- How will your chapter handle terminating a Big/Little combo? Should you have "backup" Bigs?

## **Campus Resources**

The Sorority would like to know what resources your campus has for students to access including, but not limited to: Health Services, Mental Health Services, Title IX & Sexual Assault Crisis Services, Academic Advising & Rehabilitation Services, Racial Advocacy Groups, Gender and Sexuality Advocacy Groups, etc.

## **Candidacy Termination**

Tau Beta Sigma is not for everyone, and sometimes people learn that throughout the process. Even then, some people are unable to commit to the Sorority despite the enthusiasm they may have, and the chapter has to terminate a candidacy midway through. The *Overture* guide has more guidance related to terminating a process. Here are questions to consider:

- How do you track progress throughout the candidacy process?
- Do you provide quality feedback on the candidate's progress?
- How can you make sure that candidates are still invested in joining the Sorority?
- Will the chapter have a formal vote to terminate the process?
- How can your chapter create a rehabilitative period to help the candidate?
- If a candidate wants to voluntarily end the process, how can you best support them?

# Membership Education Plan Worksheet

This worksheet will help you craft the Membership Education Plan that must be submitted to the National Leadership Team for approval before you begin your Recruitment and Membership Education Process. These prompts are the exact prompts that will be asked of your Plan. The previous two pages will assist you in completing this worksheet. Feel free to copy and paste the prompts into a new document. There is no length requirement for these prompts, however you need to provide as much detail as possible. Please direct any questions regarding this worksheet to [overture@tbsigma.org](mailto:overture@tbsigma.org).

## **Recruitment**

Provide general information about the Chapter's Recruitment Ideals (qualities sought in members, ensembles in which you primarily recruit from, methods to promote the atmosphere of inclusion, etc.) and a descriptive list of each planned recruitment activity, as well as the dates in which they will occur. If a specific date is not confirmed, include the anticipated date and time.

## **Prospective Member Requirements**

Provide a list of requirements for Prospective Members to be considered for candidacy (e.g. input from the DOB/Band Staff, attending an interview, GPA requirement, year in school, etc.).

## **Bids for Candidacy**

Describe the process of notifying Prospective Members of their selection to be a membership candidate (e.g. Bid, Letter Distribution, E-Mail, etc.). You will also need to describe the process in which you inform Prospective Members when they have NOT been selected to be a Membership Candidate.

## **Calendar**

A comprehensive calendar of the entire process from recruitment to 3rd Degree. Start times for each event should be listed on this calendar.

# Membership Education Plan Worksheet, Continued

This worksheet will help you craft the Membership Education Plan that must be submitted to the National Leadership Team for approval before you begin your Recruitment and Membership Education Process. This is the second page of prompts that will be asked when you submit your Membership Education Plan for approval. There is no length requirement for these prompts, however you need to provide as much detail as possible. Please direct any questions regarding this worksheet to [overture@tbsigma.org](mailto:overture@tbsigma.org).

## **Membership Education Roles**

Describe what the roles of the Membership Educator and the Active Membership are during the Membership Education process.

## **Big/Little System** (If Applicable)

Specifically detail the process of selecting, pairing, and revealing Big Sisters/Little Sisters. Also describe the procedure for reporting problems with a "Big/Little" pairing and the process of changing or terminating a pairing. If your chapter does not have a Big Sister/Little Sister system, please indicate that.

## **Campus Resources**

In this section, you will need to submit website links or contact information for the following resources that exist on your college or university campus: Health and/or Mental Health Services, Victim Assistance Services, Learning Disability Services, Academic Advising/Assistance Services, LGBTQ+ Outreach, All other notable resources available to students on your campus.

## **Candidacy Termination**

Describe the steps taken by your chapter when terminating an MC's candidacy (either by them or by the chapter).

# Vice President for Service and Special Projects

This page is dedicated to the chapter office handling Service, Special Projects, and Sorority Programs. Vice President for Service and/or Special Projects has a different name across the Sorority, it may be named Vice President for Service, Service Chair, Special Projects Chair, or something else. A Vice President for Service and Special Projects **should not** be your First Vice President. Per Robert's Rules of Order, your First Vice President is in charge of membership and education. A VP for Special Projects should be seated as a Second Vice President.

The role for the **VP of Service/Special Projects** should take on coordinating the service for the chapter to ensure that the needs of the band are prioritized. As a band service organization, your chapter's focus should always prioritize their commitments to your bands first and always provide quality service to the bands on your campus. If your chapter is unable to prioritize service, make sure your chapter is having conversations on what work needs to be done to prioritize projects that enrich and benefit your band program first. Remember to update your Director of Bands on your current service projects and ask for their feedback on future projects that your chapter can complete that will directly benefit the band. You can reach out to your District VP for Special Projects for assistance on generating ideas for service projects.

As the **VP for Special Projects**, you are the person to evaluate if your chapter can take on additional projects, and then ensure that your chapter has what it needs to complete the project successfully. Special projects may include any projects outside of normal chapter service and should include the Tau Beta Sigma National Programs. The Tau Beta Sigma National Programs are a way to further the ideals of the Sorority, and its mission to serve the surrounding community through music. The National Programs encourage our chapters to work together to promote their love of band,

The Tau Beta Sigma National Programs and Initiatives are:

- [Women in Music Speaker Series](#), the Sorority's hallmark Program
- [Coda](#)
- [Crescendo: A Musical Youth Initiative](#)
- [For Greater Practice: A Musicianship Initiative](#)
- [Kappa Kappa Psi & Tau Beta Sigma National Intercollegiate Band](#)

As you begin planning for the year, it is recommended to add the Tau Beta Sigma National Programs as part of your Chapter service. For example, gather a list of Women in Music at your University and surrounding area, determine locations for Coda and Crescendo, etc. For information on our National Programs, and recommendations for completing each program, please review our [National Programs Guide](#).

**The best attended events are ones that are planned well in advance and allow for ample advertisement time.**

You will be working closely with your chapter's Focus on Five Liaison. The Focus on Five Campaign was developed to encourage chapters to participate in the Tau Beta Sigma National Programs, as well as other initiatives for the Sorority and Districts. On the next page you will see the Focus on Five Liaison Job Description, which goes over the expectations from the National Council. While the positions of VPSP and Focus on Five Liaison are separate, their duties do overlap.

VPSP is a perfect job for an event planning aficionado or someone who wants to get experience in planning various types of events. You'll fine tune the skills of:

- Determining What Is Needed (Costs, People Needed, and Materials Needed)
- Building partnerships with community and campus groups
- Event planning and execution
- Providing Constructive Feedback

We have included a worksheet that you can use to organize thoughts when planning projects and service events for your chapter.



### **Key Areas of Responsibility**

#### *Chapter Operations*

- Ensure day-to-day service to your band is completed
- Plan special projects and National Programs for your band, campus, and community
- Coordinate with your Director of Bands and campus' Music Department to generate project ideas
- Ensure all events planned for your chapter are in compliance with the National, Campus, and State policies.

## Focus on Five Liaison Job Description

Reports to: Chapter Vice President for Special Projects, or like position

A Chapter Focus on Five Liaison will serve as the chapter's representative and champion for the annual Focus on Five Campaign. These members are responsible for coordinating chapter participation in the campaign, and monitoring chapter completion of the Tau Beta Sigma National Programs.

Interested Sisters should be knowledgeable of the Tau Beta Sigma National Programs, have served as a programs/service chair for your chapter or on the respective committees. This role is great for Sisters who are also interested in being a chapter programs/service chair or VP of Service/ VP of Special Programs. Time management skills, delegation, and management experience is recommended, and the ability to communicate effectively with a variety of audiences is highly recommended as well.

### **Duties of a Chapter Focus on Five Liaison include but are not limited to:**

- Familiarize yourself with the [Tau Beta Sigma National Programs Guide](#) and the requirements for each of the activities within.
- Educate members of the chapter on each of the National Programs, how they will be completed, and how the program enriches the chapter's involvement in the community.
- Collaborate with chapter officers, full chapter, or members of a committee to create activities that align with the National Programs and Focus on Five Campaign.
- Communicate logistics of activities with chapter and with Women in Music Speaker, Retirement Community director, or music teacher for the Crescendo program
- Communicate with District VPSP and/or National VPSP on activities and progress within the Focus on Five Campaign.
- Report the chapter progress of the Focus on Five Campaign, and keep the chapter informed on what the different projects are to complete the campaign.
- Motivate and coordinate the members of your committee or chapter to complete the steps necessary for the completion of the activities.
- Check the district and national Focus on Five Campaign Group(s) weekly to see updates or to post activities for your chapters Focus on Five Campaign Completion.

Questions about the Focus on Five Liaison job should be sent to your District Vice President for Special Projects and/or the National Vice President for Special Projects.

## Focus on Five Campaign

The Focus On Five campaign was first developed in 2014 by the 2013-2015 NVPSP Jonathan Markowski. It was designed to encourage each chapter's participation in Tau Beta Sigma's National Programs and has evolved to also include highlighting important chapter operations, and district initiatives.

Each year the campaign presents six or eight activities each chapter can do that are related to our National Programs. Chapters "earn" parts of the Tau Beta Sigma Flag (Stripes & Lyre Pieces) by completing each of the challenges set forth during the campaign

Those chapters that complete the flag will be recognized at each of the District and National Conventions.

For information on the Focus on Five Campaign, visit our [National Website](#).

## Event Planning Worksheet

This worksheet is designed to help you organize your thoughts around the details related to successfully hosting an event for your chapter. Every officer/chair can use this worksheet for events related to their office. [Make a Copy](#) to get started.

<b>Name of Event</b>	
<b>Connection to</b> <ul style="list-style-type: none"> <li>• TBΣ Purposes</li> <li>• National/District Programs</li> <li>• Band Program</li> </ul>	
<b>Proposed/Finalized Location</b>	
<b>Potential/Finalized Dates &amp; Times</b>	
<b>Estimated Length of Event (Set Up to Take Down)</b>	
<b>Materials needed</b>	
<b>Costs Related to Event (Budget)</b>	
<b>Did the chapter approve expenses?</b>	
<b>Expected Number of Attendees</b>	

<b>Potential Roadblocks to a Successful Event (&amp; Proposed Solutions)</b>	
<b>Potential Partnership(s)</b>	
<b>Publicity/Marketing Plan</b>	
<b>Chapter Member Tasks &amp; Responsibilities</b>	
<b>Feedback/Notes for Future Events</b>	

## Examples of Service/Special Projects

This is a sample of service projects that you can plan with your chapter. This is not an exhaustive list, as a bigger list will be made available on the National Website. If you plan and execute an event, please use the Event Planning Worksheet and submit it to your District VP for Special Projects.

### Maintenance of Band Program:

- Help with drill field set-up and tear-down (yard markers, painting lines on field, setting up podium, etc.)
- Distribute and care for marching band uniforms
- Take uniforms to cleaners for band members
- Work in the music/band office (assisting with mailings, music, drill copying, auditions, etc.)
- Clean up the music/band room
- Clean instrument storage facility
- Provide flip folders for all band members
- Purchase new instruments & equipment for the band/music department
- Resurface chairs and stands for concert hall
- Assemble pep band folders
- Clean the orchestra pit
- Build or purchase a new podium or conductor's stand
- Clean instruments
- Repair instruments for band members
- Paint the music/band building or offices
- Clean and maintain band student lounge
- Clean music chairs and lockers
- Usher for concerts
- Provide instrument repair kit at all practices and game days

### Programming for Your Bands:

- Coordinate a Parent's Day event for your band (i.e. football game, basketball game, major concert of the year, etc.)
- Provide water for band rehearsals
- Provide social activities for band camp (band picnic, swim night, ice cream social, etc.)
- Assist with band registration (making name tags, passing band material, uniform check out, etc.)
- Help move band members in and out of dorms at the beginning of school terms
- Make game day/away trip wake-up calls
- Provide snacks and water for visiting bands
- Purchase or make banners for parades, buses when traveling, etc.
- Sponsor a marching/concert band banquet
- Develop and mail band recruiting materials to area high schools for all university music ensembles
- Host receptions for concerts and recitals
- Distribute and collect folders at concerts

### Community Outreach

- Sponsor and assist with band festival
- Sponsor and organize a reading band to give student conductors practice
- Play with high school marching, pep, or basketball bands at their games and other events
- Conduct instrument workshops at elementary/middle school/junior high schools
- Assist Girl Scouts and Scouts of America with obtaining their Music Badges
- Play seasonal music for nursing homes, orphanages, band/music Faculty
- Provide pep bands for area public schools, nursing homes, band/music faculty, university day care
- Sponsor and assist with Homecoming and alumni events
  - Conduct marching band historical forum (to help new members learn the band history)

# Secretary

## *Recording | Corresponding | Alumni Relations*

**From the National Constitution:** 6.208 The Secretary shall record the minutes of all meetings of the chapter and shall sign all contracts and other instruments of business incurred by the chapter. The Secretary shall maintain a permanent record of each member of the chapter, including name, address, phone number, and instrument played. In addition, the Secretary shall prepare and send news items to the National Executive Director and shall be responsible for all chapter correspondence.

You're the Secretary of your chapter (or you're one of the Secretaries of your chapter). This usually means you like organization, interactions with people, or coordinated communications (or all of those!). In short, the Secretary position keeps the chapter in the loop of what is going on -- whether that is what is going on within the chapter, in your district, in your neighbor chapter, or with your chapter's alumni. This page will discuss the three common types of Chapter Secretaries.

As Secretary, you keep the records of your chapter. As Recording Secretary, you keep the records of your chapter's business. As Corresponding Secretary, you keep the records of your chapter's involvement with other chapters and your district. As Alumni Secretary, you keep the records of your chapter's alumni.

**Structure is your friend** as a Secretary. Preparing to be a successful Secretary means that you put in the pre-work to build as much structure as possible.

### ***As a Recording Secretary:***

Having a template where you can plug in information makes taking minutes easy. Having an agenda with as many business items as possible will help you create your minutes template before each chapter meeting. [Appendix I](#) is a Minutes Template to assist you.

#### **Key Area of Responsibility:**

- Take minutes at each official meeting of your chapter and disseminate them to your chapter members in a timely manner.

### ***As a Corresponding Secretary:***

You are the contact person for your chapter. Having up to date contact information on the National Leadership, Counselors, your CVA, and District Council is step one of chapter connectivity. You then have to regularly keep in communication with these people. Having a list of chapters in your district and immediate area, with email contact information will be resourceful as well.

#### **Key Area of Responsibility:**

- Correspond with chapters and provide updates about your chapter and share other chapters' updates with your chapter.

### ***As an Alumni Secretary:***

You are the alumni's way of knowing what is going on in the chapter, however you must maintain good boundaries with your chapter's alumni. Alumni and Life members love being able to return to campus and meet with active Sisters, however their involvement is at your chapter's discretion. You are encouraged to share updates with your alumni and to plan an event with your chapter, but it is never expected that you do so. Knowing what type of updates you want to provide your alumni, and when you want to send those updates, makes for a successful Alumni Secretary.

#### **Key Area of Responsibility:**

- Correspond with your chapter's alumni and provide updates to them about the chapter ongoing.

### **Online Membership and Reporting System:**

As Secretary, you can easily get information on your chapter, as well as track paperwork completion through the Online Membership and Reporting System (OMRS) at [online.kkytbs.org](http://online.kkytbs.org). The President's role is to complete paperwork on OMRS, but you make sure that each of your chapter members can access the system, and that their contact information is up to date.

You could hold a 15-minute OMRS walk-through during a chapter meeting or hold office hours for you to teach your members on how to access OMRS. Keeping up to date records with OMRS means that information coming from the National Leadership Team will make it to each of our active members.

# Treasurer

**From the National Constitution:** 6.209 The Treasurer shall control the receipts and disbursements of all monies of the chapter and shall submit recommendations concerning the financial policies of the chapter as may be required. The Treasurer shall sign all checks for monies disbursed. In addition, the Treasurer shall be responsible for the collection of the monies for and ordering of all regalia from the National Executive Director of the Sorority.

As Treasurer you are in charge of the chapter's finances. You have a big responsibility to constantly be up to date on the status of your chapter's finances. You have to understand a budget, line items, and keep proper records of all money coming into and leaving your chapter's bank account. Your budget is a required submission to the District Counselors each year. The next page is an annotated budget, which can help you understand the important parts of a budget. There are regulations you need to know and follow as Tau Beta Sigma is a 501c3 organization, namely that chapter funds cannot be donated to political campaigns or organizations. As a chapter officer, it is important that you read all Sorority Policies linked later on in this guidebook.

Treasurers and chapters should understand that chapter finances should not be managed in the same way that personal finances are. Chapters are encouraged to retain only 10% of their operating funds for the year, while spending/utilizing the remaining 90% in service to their band program. As a 501(c)(3), chapters should not "stockpile" large amounts of money, regardless of the circumstances. Chapters are encouraged to hold a meeting near the end of the school year, to develop a plan to use any surplus of funds before the school year ends. Examples of utilizing a surplus of chapter funds includes but are not limited to:

- Funding chapter members to attend District events, District Convention, and National Convention
- Working with the College or University Director of Bands to sponsor a project for the bands
- Updating a school of music instrument supply for technique classes
- Updating or purchasing rain gear for marching band uniforms
- Making a donation to a local junior high or high school band program

**Note: Your Chapter Treasurer cannot be the same person as your President or 1st Vice President.**

**Here are a few SHOULDs and SHOULD NOTs for Handling Chapter Funds:**

- SHOULD regularly update your chapter's budget for each chapter meeting
- SHOULD NOT overcommit chapter funds to different projects. It's okay to say, "we don't have the money."
- SHOULD follow all Sorority and University guidelines for having a bank account, including if you have to carry a "Purchase Card" issued by your Student Activities Office.
- SHOULD NOT withdraw cash from your chapter account without another person present.
- SHOULD know the process and timeline for requesting payments to be made with your university.
- SHOULD NOT have a Chapter Debit or ATM card, unless mandated by your bank or Student Activities Office. They are risky.
- SHOULD require TWO signatures on all checks written by the chapter.
- SHOULD NOT submit your chapter dues late, as it will incur a 25% late fee.
- SHOULD keep records of all transactions for at least 7 years. You can utilize a folder on your chapter's @tbsigma.org Google Drive to store receipts and your money ledger.
- SHOULD NOT link your chapter's Venmo/Cash App/etc. to a member's personal account.
- SHOULD regularly deposit the funds in your CashApp/Venmo into your bank account. This will allow you to collect interest and reduce risk of those funds getting misuse.



### The Most Commonly Asked Question from Chapter Treasurers:

*"Can members be on a dues payment plan?"*

Answer: They can! However, payment plans should not start when dues are supposed to be submitted to Headquarters. **Payment plans should end on the date dues are due.** For example, a person that needs two months to pay their dues should start paying in July and end in September.

You can pay annual dues, chapter fees, and initiate registration dues to National Headquarters online by going to <https://www.tbsigma.org/tbs-form-payment-gateway/>

### Peer-to Peer Banking (Venmo, PayPal, & Cash App)

Electronic fund transfer apps like PayPal, Venmo, or Cash App are incredibly efficient for collecting dues\* or having people pay for anything they buy as part of your fundraisers. The Sorority does not discourage the use of these apps, but chapters need to make sure that they follow all rules and regulations that their university may have when using those apps for chapter business. Please make sure you inquire about having a Venmo or Cash App account with your campus' Student Activities Office. Additionally, it is recommended that the Director of Bands, President, Treasurer, and Sponsor have access to these accounts to prevent any mishandling of money. Chapter funds **SHOULD NOT** be linked to any member's personal Venmo, Cash App, etc. account. It is recommended that a business account be set up in the chapter's name and the previously mentioned personnel be the only individuals that have the password for the account each school year. Chapter Treasurer's should also be required to indicate in reports to the chapter, all transactions that occur within the chapter's peer-to-peer business account.

*\*It should be noted that National Headquarters does **NOT** accept funds via any of the peer-to-peer banking apps. Payment of annual chapter fees and membership dues to the national organization will still have to come from a financial account that supports checks, debit cards, or e-checks.*

### **Key Areas of Responsibility:**

#### *Chapter Operations:*

- Provide regular budgetary updates at your chapter meetings
- Keep an accurate ledger of all income and expenses (sample ledger on Page 22)
- Ensure that all financial regulations are being followed

## Chapter Budget Template (Annotated)

# Chapter Budget Template

It is important to know how your funds look from year to year, and helps you make recommendations for the next year

### Summary

Totals	Budgeted 2019-2020	Actual 2019-2020	Over/Under 2019-2020	Budgeted 2020-2021	Actual 2020-2021	Over/Under 2020-2021	Proposed 2021-2022
Beginning Available Cash Balance							
Operating Income							
Operating Expenses							
Difference in Income and Expenses							
<b>Total Account Balance</b>							
<b>Available Cash Balance</b>							
Operating Income							
Income Source	Budgeted 2019-2020	Actual 2019-2020	Over/Under 2019-2020	Budgeted 2020-2021	Actual 2020-2021	Over/Under 2020-2021	Proposed 2021-2022
List out all ways your chapter is going to take in money (allocations from your institution; fundraisers; donations from alumni; etc.)							

**Total Cash Available for Use**

## Operating Expenses

## Expense Source

**Budgeted  
2019-2020**

**Actual  
2019-2020**

## Over/Under 2019-2020

**Budgeted  
2020-2021**

**Actual  
2020-2021**

## Over/Under 2020-2021

## Proposed 2021-2022

## Officer Allowances

## Committee Chair Allowances

Chapter Expenses							
Fundraising Expenses							
Total Expenses	\$0.00	\$0.00	At Budget	\$0.00	\$0.00	At Budget	#VALUE!
Allocations to Restricted Funds	Budgeted 2019-2020	Actual 2019-2020	Over/Under 2019-2020	Budgeted 2020-2021	Actual 2020-2021	Over/Under 2020-2021	Proposed 2021-2022

<b>Total Allocations</b>			At Budget			At Budget	
<b>Cash Balance After Expenses/Allocations</b>	\$0.00	\$0.00	At Budget	\$0.00	\$0.00	At Budget	

**Cash Balance After Expenses/Allocation** is the amount of money you can spend after taking into account the amount of money you are diverting to allocations and the money you are still planning to spend.

**Golden Rule of Budgeting:** Underestimate your income and overestimate your expenses and DO NOT plan to be in the Red

A clean copy of this template for you to use is available in Appendix A and [at this link](#)

## Annotated Money Ledger

	A	B	C	D	E
1	Check Number or Cash Withdrawal?	Amount	Written To	Purpose	Certain Line Item?
2					
3					
4					
5					
6					
7					
8	Document the check number that was written or the date of a cash withdrawal in this column	The amount of money for each check or withdrawal in this column	The person the check was written out to or was given the cash	The reason for the check being written or cash being withdrawn	The part of the budget that this expense lines up with
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					

Sheet1 **Sheet2** (+)

Ready Scroll Lock

# Fundraising

While the role of the Chapter Treasurer is to maintain the finances of the chapter, you may find yourself equally focused on raising funds for the chapter as well. This section offers a few tips on what you can do to bring new money into your chapter.

Fundraising, similar to service projects, is unique to each chapter. A fundraiser that works at one chapter may not work well with another chapter. It is important for you to know the history of successful fundraisers in your chapter.

- The Biggest Recommendation is: **Do not reinvent the wheel.** This means that if a fundraising project works very well for your chapter, you should continue to hold it. You can always feel free to experiment with new ideas, but do not abandon a project that can bring your chapter a good amount of money.
- The Second Biggest Recommendation: **Connect fundraisers to specific projects.** People like knowing where their money is going. Are you fundraising for a school or your band? Advertise that. Are you fundraising to send members to National Convention? Advertise that! It can also help advertise our projects, programs, and operations to potential new members.

## Examples of Fundraisers

This list is not comprehensive and are some examples of fundraisers that chapters take on. Your District Council and neighboring chapters can also assist in generating fundraising ideas for your chapter if you feel stuck or are unsure what you should do.

### Band-Based Fundraisers:

- Band camp survivor kits (aka Spirit Bags ordered by parents to give to new band members)
- March-A-Thon or March-A-Spot
- Selling parent sweatshirts and other merchandise for Parent's Day
- Goody boxes for bus trips
- Penny Wars between sections in your band
- Snack packs for game days
- Sell band videos for the end of marching season
- Sell band photos at the end of the marching season
- Play at high school football games
- "Pie-In-The-Face" at a major concert or sporting event
- "Direct the Band" contest at band concert
- Sell band/school merchandise (with your band's logo)

### University-Based Fundraisers

- Stadium cleanup
- Car Washes
- Work at sporting events on campus (basketball, baseball, etc.)
- Step Shows, Talent Shows, Lip Sync Contests
- Spaghetti dinner
- Valentine Grams
- Picture frame sales for holidays

**Community-Based Fundraisers:**

- Sell merchandise at district and national conventions
- Host a solo and ensemble contest
- Host a marching band contest
- Work for an all-region or honor band contest
- Paid musical gigs (small ensembles, pep bands, etc.)
- Work a major sporting event with concessions or sell programs (baseball games, football games, basketball games, etc.



# Miscellaneous Chapter Positions

This page provides a list of different chapter positions that are common across the Sorority and a brief description on what each position does. These do not need to be elected positions in your chapter but can be appointed by the Chapter President or Executive Officers. If you would like more information on how to establish that position in your chapter, please contact a member of your District Council or the National Leadership Team.

## **Ritual and Regalia Coordinator**

Plan and set up for the Rituals of First, Second, and Third Degree.  
Discuss each ritual with the Membership Candidates as part of the *Overture* curriculum.

## **Historian**

Document your chapter's events and accomplishments throughout the year.  
Utilize digital means of archiving to easily share and pass down chapter updates.

## **Parliamentarian & Sergeant-at-Arms**

Ensure Robert's Rules of Order are being practiced throughout each of your chapter's meetings.  
Educate the Membership Candidates on Robert's Rules as part of the *Overture* curriculum.  
Ensure any disruptions from meeting attendees are handled, and escort a person out of a meeting, if needed.

## **Webmaster & Social Media Coordinator**

Regularly update your chapter's online presence through a website and social media.  
Utilize Facebook, Twitter, and Instagram to communicate general messages about your chapter.

## **Social Coordinator**

Plan social-based events for your chapter and band.  
Utilize the Event Worksheet on Page 15 under the VPSP section.

## **Music Coordinator**

Teach your chapter members and Membership Candidates the Sorority Songs and your school's alma mater.  
Hold rehearsals with your chapter to review Sorority and University songs.

## **Assistant Vice President for Membership**

Assist the VP for Membership in operating your Membership Education Plan.

## **Recognitions Coordinator**

Coordinate your chapter's efforts to apply and nominate for National and District Awards.  
Coordinate your chapter's awards for members and your band.

## **Sisterhood and Spirit Coordinator**

Generate fun ideas to keep people engaged with chapter activities.  
Plan events that promote sisterhood and create connections with members of your chapter.

## **Campus Engagement Liaison**

Work with organizations on campus to hold programs and projects together.  
Gets the chapter involved with the activities created by the Student Activities Office

## **Community Engagement Liaison**

Works with organizations in the community to hold programs and projects together  
Gets the chapter involved with activities organized in the community your campus is in

# Online Chapter Operations

Chapters have embraced different ways to hold their meetings, elections, and other events that can be transitioned to an online format. In 2020, all District Conventions were held online due to the COVID-19 Pandemic. Here are some examples of how you can hold different facets of your chapter online. Being in person is always good because people work off each other's energies, but you can always explore ways to be online.

## Chapter Meetings

You can hold your chapter meetings on Zoom, Google Meet, Microsoft Teams, or any other digital meeting platform.

We recommend being as efficient as possible. After about 30-60 minutes of staring at a screen, people start to lose their attention span. Hold any necessary votes in chapter business meetings at the beginning to make sure you have all important business taken care of. Additionally, the longer that meetings go on, it is less likely people's internet connection will continue to cooperate.

## Membership Education

Utilizing platforms like Google Classroom to hold all of your membership education program materials can be useful. This will allow you to break each of the modules up into their own lesson and allow your candidates to work through them on their own.

## Your Chapter @tbsigma.org Email Address & Google Calendar

Every chapter has an @tbsigma.org email address, which grants you access to the *Overture* Google Drive. However, your email address has access to the Google Suite, which means you can centralize your chapter's calendar into Google Calendar. You can put all of your chapter's events, meetings, and committee meetings onto Google Calendar and "invite" the appropriate people. You can set it up where Google Calendar sends reminders for events.

## Women in Music Speaker Events

While an in-person Women in Music event is always preferred, you can invite speakers to virtual Women in Music Speaker events where they talk to a virtual audience. Utilizing online meeting platforms and sharing the link to join are great ways to hold Women in Music Speaker events online.

## Rituals

Due to the private nature of the Sorority's Rituals, we do not recommend that chapters attempt to execute any of them virtually. The National Leadership team is available to assist chapters in implementing an online alternative to in-person Rituals. A hybrid option of having National Leadership hosting a Virtual Ritual Experience, as well as holding an in-person ritual is not allowed. Our Rituals are sacred activities for the Sorority and should either be held in person by the chapter, or executed online by the National Leadership Team.

## Elections

You can utilize programs like Election Runner and Google Forms to run your chapter elections or secret ballots during meetings. Election Runner does come with a cost for elections involving 20 or more people, but Google Forms is free. Election Runner automatically uses the plurality method, eliminating the need for multiple votes. You can have candidates film themselves giving their speeches, and then allow people to write questions to them, or hold an online meeting for the speech and Q&A session.

## Committee Meetings

Committee Meetings can be run in innovative ways. You can hold an online meeting on Zoom or Google Meet. You can have a "paper meeting" where you pose questions in a Google Form or Google Document and have your committee members respond in writing. You could call each person separately and gather information, but that may be time consuming.

## Social and Bonding Events

There are ways to provide a meaningful and worthwhile social experience for members of your chapter, and even members of your band. Utilizing online gaming platforms or coordinated video games that have an online function are great ways to connect. You can also explore holding movie nights, workout or yoga sessions, or even just a general hangout where you all sit and chat are ways you can still bond with each other online.

*\*Tip: When you plan for the semester, build in an online operations backup in case someone doesn't feel well enough to show up in person. For example, someone may not feel well enough to come to an in-person chapter meeting, but could join on Zoom. Having the backup allows for better access to your chapter's events, meetings, and activities.*

# Committees & Committee Meetings

Committees are excellent ways to get members involved in the minutia of the chapter, including but not limited to planning an event, debating a new policy, and discussing how the next year's budget should be crafted. Your chapter should establish any and all committees that you feel are necessary. This page intends to assist your chapter on how to best use committees to further your operations.

The National Constitution of Tau Beta Sigma requires the following standing committees in every chapter:

**Service:** typically used to generate service project ideas and to be the planning committee of all service

**Membership:** typically ensures that members remain in good standing with the Sorority

**History:** typically used to assist in the documentation of chapter events and activities

**Ways & Means:** typically used to maintain the financial wellbeing of the chapter

**Ritual & Regalia:** typically used to plan and execute official Rituals of Tau Beta Sigma

*Other Committees that are popular include:*

- Social
- Fundraising
- Correspondence or Communications
- Scholarships & Awards
- Campus Involvement
- Jurisdiction or Constitution Revision

A rule of thumb for Committees: **You do not need to have committees if your chapter becomes so small that everyone is serving on every committee.** For example, the Ritual and Regalia committee could be a committee of one that plans all the details for official rituals. Additionally, some committees can be a committee composed of everyone, such as the Service Committee. If you believe your chapter cannot sustain all of the "required" committees, you can consider suspending or combining some of the committees.

**Committees are intended to promote efficient business practices.**

Your chapter meetings are intended to be the place where your chapter makes the final decisions.

Chapters frequently get bogged down by planning out various events during their chapter meetings.

Committees are the place to plan out details, generate ideas, and then present plans to the chapter to vote on.

**Committee Meetings should have agendas and goals.**

When you hold a committee meeting, you should have expressly thought out goals you want to

accomplish. "Crafting the next semester's budget" could be a goal for the Ways and Means Committee.

Similar to having a chapter meeting, you have to keep people on task and move the conversation along.

If you are a committee member, you should always enter a committee meeting with a "get to work"

mindset because you will want to positively contribute to the conversation. If you have an idea or if you

want to take on a committee task, this is the place where you will want to speak up. Taking an opportunity to lead a project is excellent leadership development experience!

# Officer Transition

Officer Transition typically happens towards the end of the semester. It does not happen at the same time for all of our chapters, as it happens in the Fall and Spring semester. Allow your chapter some time to adjust to new leadership. You can hold elections on one day and not install them until closer to the end of the semester, commonly called “the shadow period” where incoming officers are shadowing the outgoing officers.

As your chapter gets ready for elections, here are some helpful steps that you, as a candidate for office, can use to help you set your office up for a successful transition to the next officer.

## **For Candidates for Office:**

### *Meet with the Current Officer*

It is important to gather as much information as possible about what members of your chapter want to see out of the office you are interested in running for. One of the most important people to meet with should be the person who is currently holding the position. They have a fresh understanding of the job and can provide you good feedback to know. If you end up winning the election, you should plan to meet with this person again.

### *Meet with as many People as You Can*

Even if your meeting is a couple text messages or sitting on a bench having coffee together, you should gather as much perspective as possible. This will help you craft a comprehensive platform to help move your chapter forward. Your current Chapter President is a very good resource, because they would have a good idea after spending a year running the chapter.

## **For Outgoing Officers:**

### *Accept You Have to Let Go*

We spend so much time devoting ourselves to doing the best job that we can. Sometimes it can be very hard to let go of an office. Understand that you need to let go and let someone else explore their leadership potential. Your time was extremely valued but moving on is an important step in Sorority leadership.

### *Meet with the Incoming Officer*

Even if this is not the person you preferred to be elected, it is important to sit down and talk in depth about the details of the office that they should be aware of. There are always certain aspects of an office that people have to learn, so do not give away all of the secrets, but the most important and useful knowledge should be passed down.

You can utilize the worksheet on the next page to help organize your thoughts (or you can print out the page, fill it out, and give it to the officer candidates)

## **Recommended Timeline for Officer Transitions:**

<b>Action Step:</b>	<b>When:</b>
<input type="checkbox"/> Call for Nominations for Officer Elections	45 days before end of Semester
<input type="checkbox"/> Meet with Current Officer	30-40 days before end of Semester
<input type="checkbox"/> Hold Chapter Elections	20 days before end of Semester
<input type="checkbox"/> Meet with Incoming Officer	10 days before end of Semester
<input type="checkbox"/> Install New Chapter Officers	5-10 days before end of Semester
<input type="checkbox"/> File Officer & Chapter Update on OMRS	0-30 days after Elections

## Officer Transition Worksheet

Use this form to reflect on your time as a chapter officer. You can use this worksheet for your own personal reflection, or you can fill out this worksheet and hand it off to the incoming chapter officer. You can write in it or copy and paste the worksheet into a new document and print it out, whichever method works for you best. Either way, this will assist you in organizing thoughts on how to best transition from you as the current officer to the new incoming officer.

<b>Office</b>	
<b>Recurring Materials Needed</b> Is there anything physical needed to do this job? (Gavel, cash envelope, etc.)	
<b>Typical Events</b> Are there recurring events this office plans from year to year?	
<b>Key Collaborators</b> Are there people this office needs to be in constant communication with? (Chapter Officer, District Officer, District Counselor, etc.)	
<b>One of the Best Moments</b> Describe one of your favorite moments from this past year	
<b>One of the Tough Moments</b> Describe one of the moments that challenged you the most	

<p><b>Leadership Lessons</b></p> <p>Describe ways you feel you have furthered your leadership abilities</p>	
<p><b>Essential Advice</b></p> <p>What is the most important information you think the incoming officer should know?</p>	

# Sorority Policies

The Sorority has policies that inform actions of the organization and our chapters. This page documents the list of policies our Sorority has. It is important for chapter members to fully understand our policies. Questions about our policies can be sent to [council@tbsigma.org](mailto:council@tbsigma.org).

You can find our full policies at: <http://tbsigma.org/policies>

- Affiliate Groups
- Alcohol, Illegal Drugs, and Controlled Substances
- Assault and Battery
- Branding and Scarification
- Convention Attendance
- Discrimination
- Firearms, Explosives, or Other Incendiary Devices
- Hazing
- Human Dignity Policy
- Membership Education
- Membership Presentation Shows/Probate Shows
- Retaliation
- Sexual Misconduct



## Chapter Statuses & Membership Statuses

The National Constitution defines **Chapter Statuses** under *Section 6.1*. These statuses are: Active, Administrative Hold, Observation, Probation, Suspension, and Inactive.

The National Constitution defines **Membership Statuses** under *Section 6.6*. These statuses are: Active, Conditional, Inactive, Associate, Honorary, Alumni, Life, Probation, Suspended, and Expelled.

## Advocacy Efforts

The Sorority encourages chapters to get involved with advocacy efforts on your campus or community, however Tau Beta Sigma is not a political organization and must not remain a 501c3 organization. The Sorority has developed a guide to working with advocacy organizations and making donations using chapter donations, which can be obtained by emailing the National Council at [council@tbsigma.org](mailto:council@tbsigma.org).

## Trademark Policy

The Coat of Arms, Tau Beta Sigma, TBS, and its national publication “The Podium” are all registered trademarks of Tau Beta Sigma National Honorary Band Sorority.

## Branding

The Sorority has official branding guidelines for the use of our logos, crest, colors, and fonts. It is important for chapters to understand the proper use of our branding. The Branding Guidelines can be found at: <https://www.tbsigma.org/wp-content/uploads/2020/03/TBS-BrandGuidelines-2020.pdf>

## Jewelry & Merchandise

*Jewelry:* All officially licensed Sorority jewelry, with the exception of membership recognition pins for new initiates, must be ordered from the jeweler KDT & Company (<http://www.greekmarketplace.net>).

*Merchandise:* Official vendors of Kappa Kappa Psi and Tau Beta Sigma merchandise can be found on <http://kkytbs.org>. If you are interested in becoming a licensed vendor of Kappa Kappa Psi or Tau Beta Sigma products, please contact Affinity Consultants (p: 760-734-6764, ext. 140 or <https://www.affinityconsultants.com/>)

## IRS & Chapter EIN

In letters of determination from the Internal Revenue Service dated October 5, 1976 and November 12, 1976, Tau Beta Sigma, with respective affiliate chapters, was ruled to be exempt from Federal Income Tax under section 501(c)(3) of the

Internal Revenue Code of 1954. This exempt status is a significant benefit to the National Organization but requires the National Headquarters to fulfill basic reporting procedures. The National Headquarters files an organizational Form 990 annually. However, chapters who have annual gross receipts of \$25,000 or more are required to file a separate Form 990. At this time, NO CHAPTER should be filing this form. Any correspondence from the Internal Revenue Service should be referred immediately, to the National Headquarters.

The following also apply:

1. Tau Beta Sigma is classified as a not-for-profit organization and has been granted group tax exemption numbers under Section 501(c)(3) of the Internal Revenue Code of 1954.
2. Each chapter has been assigned a specific Employer Identification Number (EIN) which may be obtained by emailing or calling the National Headquarters. This number is required when opening or maintaining a chapter bank account.
3. This organizational exemption DOES NOT automatically exempt your chapter from payment of state and city sales tax. Chapters must check with respective State Tax Commissions to confirm their status.
4. Donations made to Tau Beta Sigma Chapters or the National Organization are tax deductible as provided by law.
5. PLEASE be sure to direct any correspondence from the IRS to the National Headquarters. We are here to assist you, but we rely on individual chapters to help maintain our tax-exempt status.

# Frequently Asked Questions for Chapter Operations

**Q: Can we have events off campus?**

A: The short answer is that it depends. You should always check in with a member of the National Leadership Team if you are planning to hold events off campus. Depending on the location, it may involve signing a contract for an event space, or it may involve a space known to have risk management issues. All that said, no chapter events should be occurring in private residences (dorm rooms, off campus apartments, etc.).

**Q: What's the best recommendation for dues payment plans?**

A: We understand that college students may need a little bit of time to pay their dues, but payment plans should not start at the deadline to pay dues. They should end on the date that dues are to be paid. For example, if your chapter requires that dues are due on September 1st and a member needs two months to pay their dues, the plan should begin in July and end in September.

**Q: How do abstentions work in our business meetings?**

A: The common misconception of abstentions is that they shorten the voting pool so that a smaller number of yes votes are needed to pass a vote. That is wrong. When you are abstaining, you are both saying, "not yes" and "not no." You still need the required amount of yes votes from the people present. For example, 15 people voting would mean that you need 8 yes votes to pass from a simple majority. If 5 people were to vote no and 4 people were to abstain, the vote would fail because you did not reach the required 8 yes votes.

**Q. Can we have a fundraiser to pay for members or initiate dues?**

A: No. As a 501(c)(3) non-profit organization, holding a fundraiser to solely pay for membership dues does not fall within our charitable purposes, which allows us to retain our non-profit status. You may hold fundraisers to pay for travel and attendance at events such as District and National Conventions because these are considered professional development events, and donated funds may also be used towards such events.

**Q: How much can we charge our members for chapter dues?**

A: Chapter Dues are dues that are paid to the chapter for being a member of the chapter. Chapter Dues cannot be more than 75% of current National dues per 6.304 in the National Constitution.

**Q: Can we charge our new initiates chapter dues at the time of their initiation?**

A: You may only charge your members the amount of their initiate dues at the time of their initiation. You cannot charge any additional dues.

**Q: Do Spring Initiates pay Initiate Dues in the Spring and then have to pay Membership Dues in the Fall?**

A: Yes, Spring Initiates will pay their initiation dues at the time of their initiation, and then pay their active member dues later on in the year if they wish to be active during the next school year.

**Q: Can our chapter use a point system to ensure attendance?**

A: Chapters can be creative in how they manage their attendance policies; however, point systems can be complicated and hard to maintain. We suggest having chapter-wide discussions on how to ensure people attend required events. If people begin missing events, you should be having conversations with those people to figure out why they are not showing up.

**Q: How do we place members on Probation or Suspension? Similarly, how can we expel a member?**

A: First, you should make sure you are communicating with your Sponsor, DOB, and District Counselor. After you have done that, make sure your votes to place a person on Probation or Suspension are in compliance with the appropriate sections of the National Constitution. If you are planning to expel a member, the National Council will work with you to make sure that all procedures are followed.

**Q: How do we mark a member inactive if they have paid dues for the year?**

A: Members who pay dues are considered Active for the year. Members who wish to become permanently Inactive in the midst of the year should be placed on Suspension status for the remainder of the year and

then noted as Inactive on the next year's Chapter Personnel Report. Inactive is only defined as a member who does not pay their annual dues and they are considered in bad standing with the Sorority. If this is a temporary Inactive status, the member should be placed on Suspension status for the time they plan to not be involved with the chapter.

***Q. How do we write a new constitution?***

A. Your District Counselors or Chapter Visitation Assistant will work with you each year on keeping your constitution up to date. Most often, just a few amendments are needed, rather than "reinventing the wheel." As a reference, please check [this guide](#) to determine you have all the necessary information in your chapter constitution. A best practice that all chapters should implement is to review their chapter constitution shortly after our biennial National Convention occurs, to ensure that it aligns with any changes that were made to the National Constitution.

# Appendix I: Minutes Template

## **Chapter:**

## **Date and Time:**

Meeting Presided by:

Minutes Taken by:

Members Present:

Members Absent:

## **Secretary's Report:**

Motion to Accept Last Meeting Minutes made by:

Seconded by:

Motion Passes/Fails

Opposed:          Abstained:

## **President's Report:**

## **Treasurer's Report:**

Motion to Accept Treasurer's Report made by:

Seconded by:

Motion Passes/Fails

Opposed:          Abstained:

## **Officer Reports**

- Vice President for Membership
- Vice President for Special Projects
- Corresponding Secretary
- Historian
- [Any other offices your chapter has]

## **Committee Chairperson Reports**

- Ritual and Regalia
- Fundraising

## **Old Business**

[Where members can put business topics that need to be checked in on or wrapped up at this meeting]

## **New Business**

[Where members can put new business topics that need to be discussed and/or voted on at this meeting]

## **Closed Business (or Executive Session)**

[Where members discuss and vote on topics that cannot be shared beyond the chapter -- ritual discussions, membership statuses, etc.]

## **Open Question and Answer Time**

[Where members can bring up any business not already discussed]

Motion to Adjourn Chapter Meeting made by:

Seconded by:

Motion Passes/Fails

Opposed:          Abstained:

## **Chapter Meeting Ended at:**

# Appendix II: Chapter Budget Template

<b>Summary</b>							
	<b>Budgeted 2019-2020</b>	<b>Actual 2019- 2020</b>	<b>Over/Under 2019-2020</b>	<b>Budgeted 2020-2021</b>	<b>Actual 2020- 2021</b>	<b>Over/Under 2020-2021</b>	<b>Proposed 2021-2022</b>
<b>Totals</b>							
Beginning Available Cash Balance							
Operating Income							
Operating Expenses							
Difference in Income and Expenses							
<b>Total Account Balance</b>							
<b>Available Cash Balance</b>							
Operating Income							
	<b>Budgeted 2019-2020</b>	<b>Actual 2019- 2020</b>	<b>Over/Under 2019-2020</b>	<b>Budgeted 2020-2021</b>	<b>Actual 2020- 2021</b>	<b>Over/Under 2020-2021</b>	<b>Proposed 2021-2022</b>
<b>Income Source</b>							



Fundraising Expenses							
Total Expenses	\$0.00	\$0.00	At Budget	\$0.00	\$0.00	At Budget	#VALUE!
Allocations to Restricted Funds	Budgeted 2019-2020	Actual 2019- 2020	Over/Under 2019-2020	Budgeted 2020-2021	Actual 2020- 2021	Over/Under 2020-2021	Proposed 2021-2022

## Total Expenses

\$0.00

\$0.00

## At Budget

\$0.00

\$0.00

## At Budget

## #VALUE!

## Allocations to Restricted Funds

**Budgeted  
2019-2020**

Actual  
2019-  
2020

## Over/Under 2019-2020

**Budgeted  
2020-2021**

Actual  
2020-  
2021

## Over/Under 2020-2021

## Proposed 2021-2022



<b>Total Allocations</b>			At Budget			At Budget	
<b>Cash Balance After Expenses/Allocations</b>	\$0.00	\$0.00	At Budget	\$0.00	\$0.00	At Budget	

**Golden Rule of Budgeting:** Underestimate your income and overestimate your expenses and DO NOT plan to be in the Red. A clean copy of this template for you to use is available in Appendix A and [at this link](#)