



Alpha Kappa Alpha Sorority, Incorporated[®]



International Standards Committee Chapter Operations Workshop

Soror Glenda Glover

Supreme Basileus

Soror Brenda Lewis

Chairman of International Standards

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International Regional Representative

International Standards Committee

Purpose

This workshop will provide an overview
of Virtual Chapter Operations

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***The International
Standards Committee***

The International Standards Committee

- ❖ Establish the criteria and implement the evaluation of chapters
- ❖ Assist chapters in improving chapter operations, program implementation, and advance the training and development of leaders and membership
- ❖ Develop, maintain and update the Standards publication
- ❖ Ensure chapters are in compliance with sorority rules and procedures

The International Standards Committee

- ❖ Provide training opportunities to improve and enhance chapter operations
- ❖ Ensure chapters conduct a self-assessment annually
- ❖ Ensure chapters submit an annual End-of-the-Year Report
- ❖ Evaluate chapter patterns and trends to develop recommendations for strategies to improve chapter operations

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***Excellence in Chapter
Operations***

Excellence in Chapter Operations:

- Effective Chapter Leadership
- Review of Standards Forms and Documents
- Maintaining Operational Excellence in a Virtual World
- End-of-the-Year Reporting
- Key Reference Materials

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Effective Chapter Leadership

Effective Chapter Leadership

- Officers should have a thorough understanding of the requirements and responsibilities of the offices they hold;
- They should work to foster Alpha Kappa Alpha Sorority's ideals and principles; and
- Ensure that we live up to the standards that have been established for our sorority

Effective Chapter Operations

- Conducts business and successfully accomplishes sorority goals
- Follows standard operating procedures to ensure efficient and effective execution of work.
- Foster consistent practices and procedures within each chapter
- It is the role of ***every member*** of Alpha Kappa Alpha Sorority, Incorporated to understand how we operate

Chapter Officers

Chapter Officers

- **Required elected officers for all chapters**
 - Basileus
 - Anti-Basileus
 - Grammateus
 - Epistoleus
 - Tamiochos
 - Pecunious Grammateus (approved at the 2018 Boule)
 - *Ivy Leaf* Reporter
 - Graduate Advisor (*If the chapter sponsors an undergraduate chapter*)

Other Possible Chapter Officers

- Anti-Grammateus
- Anti-Tamiouchos
- Anti-Pecunious Grammateus
- Historian
- Philacter
- Hodegos
- Member-At-Large
- Custodian
- Business Manager
- Chaplain

***Additional officers may be defined in the Chapter Bylaws.*

Role of Basileus

- ❖ Presides at each chapter meeting and Executive Committee meeting
- ❖ Acquires the meeting room
- ❖ Prepares an agenda for each meeting
- ❖ Stands to call the meeting to order, states a motion, puts a motion to vote, explains, speaks, recognizes members, and announces results of the vote

Role of Basileus *cont...*

- ❖ Signs vouchers, if necessary, to approve the disbursement of funds approved by the chapter
- ❖ Serves as the official representative of the chapter at meetings, conferences, and other civic or social events
- ❖ Appoints committees and committee chairmen

Role of Anti-Basileus

- ❖ Studies the chapter bylaws, official documents and Robert's Rules of Order Newly Revised, (12th Edition) to be familiar with parliamentary procedures, and to be an able successor to the Basileus should the need arise
- ❖ Presides at chapter meetings in the absence of the Basileus
- ❖ Automatically becomes Basileus if the Basileus cannot complete her term of office unless the bylaws provide to the contrary (i.e., vacancy filled by an election)
- ❖ Attends all program committee meetings and activities

Role of Anti-Basileus *cont...*

- ❖ Serves as a member of the Finance Committee
- ❖ Outlines the International Program and clearly states the goals
- ❖ Develops a program calendar annually
- ❖ Submits Program summaries online after each program
- ❖ Submits Program End of Year Report by December 31

Role of Grammateus

- ❖ Records business sessions
- ❖ Maintains accurate records of all chapter proceedings
- ❖ Assists the Basileus with preparing the agenda
- ❖ Records motions, and voting outcome

Role of Grammateus *cont...*

- ❖ In the absence of the Basileus and Anti-Basileus, calls the meeting to order and immediately conducts the election of a Chairman Pro-Tem
- ❖ Maintains an alphabetical roster of all active members
- ❖ Maintains the approved minutes and all written committee reports submitted. At the end of the year, places both minutes and the reports in a book or a binder
- ❖ Minutes should be signed by the Grammateus with the approval date and include the signature of the Basileus

Chapter Minutes

- ❖ May be maintained in a book or a binder
- ❖ Does not require hard binding
- ❖ Chapters can take photo(s) of their bound minutes as part of their electronic submission

Virtual Financial Procedures

- ❖ Monitoring budgets, financial operations and financial reports are the responsibility of the:

Pecunious Grammateus

Tamiouchos

Basileus

Virtual Financial Procedures

Available Tools:

- ❖ FaceTime, Google Duo or video conferencing programs such as Zoom, GotoMeeting etc.
– *for communication*
- ❖ Cash Receipt App for Android/iPhone; QuickBooks or other accounting software
– *for electronic receipts*
- ❖ Microsoft Excel and Word; Adobe Acrobat; Jot Forms
– *for vouchers, forms, reports, and electronic signatures*

Virtual Financial Procedures

Available Tools:

- ❖ PayPal
 - *for payments, fund transfers*
- ❖ CashApp
 - *for payments only*
- ❖ OneDrive, Dropbox, Google Drive, etc.
 - *for cloud-based storage*

Pecunious Grammateus

- ❖ Receives all chapter payments/funds, receipts funds and transmits funds to the Tamiouchos
- ❖ E-receipts can be provided using Cash Receipt App (a free download app) from your Android/iPhone
- ❖ Prepares Funds Transmittal to the Chapter Tamiouchos; secures signature of the Tamiouchos and maintains the transmittal forms for the chapter files electronically.
- ❖ Practices social distancing when physically transferring cash/checks.

Tamiouchos

- ❖ Receives funds transmitted by the Pecunious Grammateus with a countersigned Transmittal of Funds document by email. A copy of the document should be maintained by both officers.
- ❖ Provides Check Request Vouchers in pdf format to chapter members upon request.
- ❖ Monitor PayPal account if applicable and transfer funds to the appropriate chapter account monthly.

Tamiouchos

- ❖ Receives and reviews completed and signed vouchers with supporting documentation in accordance with the Chapter Budget and submits vouchers to the Basileus for final approval. Approved vouchers are signed by the Basileus and the Tamiouchos.
- ❖ Prepares checks, retrieves the necessary signatures practicing social distancing and mails checks to the payee.
- ❖ Prepares Monthly Financial Reports as pre-COVID; places them in cloud-based storage application for access by chapter members.

Remember....

- ❖ Financial Procedures – requirement for checks and balances remain the same during this COVID-19 Pandemic.
- ❖ Use the convenience of electronic signatures for vouchers whenever possible.
- ❖ Practice social distancing (six feet apart) at all times – wear your mask when meeting to transfer/deposit cash and checks. Minimize in-person contact.

Role of Graduate Advisor

- ❖ Follows established guidelines as detailed in the Graduate Advisors' Certification and Procedure Manual
- ❖ Serves as liaison between the graduate and undergraduate chapters
- ❖ Serves as liaison between the undergraduate chapter and the Regional Director



Role of Graduate Advisor *cont...*

- ❖ Advises the undergraduate chapter in their interpretation and implementation of the Alpha Kappa Alpha Program, the Manual of Standard Procedure, the Undergraduate Membership Intake Process Manual, the Anti-Hazing Manual, and other official resources
- ❖ Attends all meetings and activities of the undergraduate Chapter
- ❖ Works in cooperation with college or university officials

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Review of Standards Documents

Standards Key Reference Materials

“Standards Resource Guide”

- Fosters effective and strategic processes.
- Provides understanding of chapter operations, evaluations, training, and governing documents.

“Documents & Records Retention Matrix”

- Defines which documents must be maintained permanently or a specific period of time.

“So Now You’re Elected”

- Contains roles and responsibilities for each officer or chairman
- Covers overall succession planning to grow and develop leaders.
- Blueprint built upon strengthening and improving skills and successfully preparing future leaders.

Standards Key Reference Materials

“Pandemic Guide to Virtual Chapter Operations”

- Outlines guidelines for conducting chapter operations virtually. Includes preparation and execution of a virtual meeting, financial procedures to consider, voting procedures, risk management considerations and suggested membership and sisterly relations activities.

“Standards Reporting Guidelines ”

- Provides step by step instructions on completion of the Standards EOY Report.

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Standards Reporting Guidelines

Contents

Chapter Self-Assessment

- ❖ Is found in the Standards Resource Guide
- ❖ Should be completed by the November Chapter Meeting
- ❖ Is for the current year; not what you want to do next year
- ❖ Data collected is summarized and reported in the End of Year Report
- ❖ Used by chapters to update and address areas of concern expressed by the chapter members
- ❖ Data can also be used for planning purposes for the upcoming year

Chapter Self-Assessment

- ❖ Should be copied and distribute to all members of the chapter
- ❖ Methods that chapters can use for chapter self-assessments.
 - Secret Ballot
 - Open Vote
 - Phone Poll
 - Electronic Format
 - Polling feature in Zoom

Officer/Committee Chairman Transition Form

- ❖ Located in the Standards Resource Guide, So Now You're Elected, and Standards Reporting Guidelines.
- ❖ Documents transitioning of all documents and files from one administration to the next

Soror Code of Ethics

- ❖ Found in the Standards Reporting Guidelines
- ❖ To be signed by chapter officers after installation of officers in December.

Chapter Evaluations

Chapter Evaluations

- ❖ The International Standards Team has the responsibility for developing and implementing the chapter evaluation process
- ❖ The evaluation process is designed to make sure that every chapter of Alpha Kappa Alpha Sorority, Incorporated is operating in excellence based on adherence to the *Constitution and Bylaws*

Chapter Evaluations

- ❖ Evaluations may be initiated by the Supreme Basileus, the Regional Director, or by request of a chapter through the Regional Director.
- ❖ Chapters shall be notified by the Regional Director in writing no more than 45 days prior to the scheduled evaluation.
- ❖ Results of the evaluation are sent in a summary report to the Regional Director at least 30 days after the evaluation.

Chapters To Be Evaluated

- ❖ Newly Chartered Chapters
- ❖ Chapters requiring re-evaluation based on previous evaluation score
- ❖ Chapters recommended by the Regional Director
- ❖ Three years prior to the evaluation will be covered for chapters being evaluated in 2020 (2017, 2018, 2019)

Chapter Evaluations

- ❖ The Regional Director will determine if the Chapter Evaluation will be onsite or electronic
- ❖ Undergraduate chapters are evaluated on an annual basis

Evaluations Rating Scale

- ❖ To make the evaluation ratings uniform for all chapters, a fourth grading scale has been added
- ❖ The following grading scale shall be used for chapter evaluations:
 - **4** means “Exceeds Requirements” (greater than 90%)
 - **3** means “Meets Requirements” (80%-89%)
 - **2** means “Needs Improvement” (70%-79%)
 - **1** means “Not Satisfactory” (less than 70%)
- ❖ Evaluation results shall be forwarded within 30 days from the date of the evaluation by the Regional Director

International Standards Committee



**Soror Brenda Lewis, Chairman
Mid-Western**



**Soror Nancy Gaskins
North Atlantic**



**Soror Tara L. Fikes
Mid-Atlantic**



**Soror Panayotta "Penny" Birch
South Atlantic**



**Soror Gerri Horton
Great Lakes**



**Soror J. Dawn Magee
South Eastern**



**Soror Cynthia Nance
South Central**



**Soror Michelle R. Willis
Central**



**Soror Crystal Johnson Turner
Mid-Western**



**Soror Lanée Burns
Far Western**



**Soror Presleith Yvette McPhee
International**



*Thank
You!*