57th South Atlantic Region Delegate Conference Report

Ph Phi Omega Chapter

April 22-25, 2010

Summary of Workshops
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57th South Atlantic Regional Conference
Atlanta Marriott Marquis and Hyatt Regency Atlanta
Atlanta, Georgia
April 22-25th 2010

Included in this report is a synopsis of the workshops attended by the delegates.

Chapter Finances 101
Enhancing Sound Financial Practices
Presenter: Soror Geri Baldwin Gonzalez, SA Region, International Finance Committee, Upsilon Alpha Omega
Report by: Soror Mavis Bradley

The purpose of the workshop was to ensure that all chapter financial practices are sound and up to date. The workshop covered the following:

- Efficient and effective management of chapter finances
- Establishing an orderly method of reporting income and expenditures
- Accurately reporting of the chapter’s financial operations
- Responsibilities of chapter financial officers

Issues related to chapter foundations were also covered.

Overview/Scope
A study was conducted for the purpose of reducing risks associated with chapter foundations
- Each foundation that had been established by a chapter was reviewed
- 187 chapters have established foundations in 9 regions
- 20% of all 958 chapters have established foundations
- 15% were established to purchase sorority houses; 85% were established to support chapter programs

Findings and Recommendations:

Finding #1: Contributions were received in the name of the foundation, but the funds were then distributed to the chapter for chapter operations.
- **Recommendation:** Contributions made to the foundation should be received into the foundation bank account, which is to be separate from the chapter bank account.
- **Recommendation:** All disbursements of funds should be properly made from the foundation account (for the intended exempt purpose); and must NOT be transferred from the foundation to the chapter.

Finding #2: For foundations established to support chapter programs, there is no consistency as to whether the program budget is included with the budget for the chapter or with the foundation.
Recommendation: Program activities should be included in the foundation budget. The chapter budget should, therefore, include an income and expense line item for programs, thereby providing a link to the program activities from the chapter.

Finding #3: For foundations established to support chapter programs, there is no consistency as to whether the officers of the foundation will be the same as (or different from) the officers of the chapter.

Recommendation: The President of the Foundation and the Treasurer of the Foundation should be the same as the President and Treasurer of the Chapter. This avoids the risk of foundations making independent decisions regarding programming that differ from the chapter’s programs.

Conclusion

- The moratorium on establishing no new foundations is continued until all foundations have come into compliance with the rules and regulations of the applicable governing bodies.
- Immediate action must be taken by those chapters that are not in compliance.
- A process will be established for annual compliance reporting of all chapter foundations.

**Board Responsibility / Code of Conduct**

Presenter: Soror Lucretia Payton-Stewart PhD, International Economic Leadership Through Service Committee, 13th Regional Director, Supreme Parliamentarian, Kappa Omega

Report by: Soror Alline Clancy

Objectives

- Clarify the roles & responsibilities of Board Members
- Discuss the Code of Conduct detailed in our documents

Offices Requiring Leadership Certification

- 1st Supreme Basileus
- Supreme Grammateus
- Supreme Tamiouchos
- Regional Director
- Second Supreme Anti-Basileus
- Undergraduate Member at Large

Regional Graduate Sorors, 2008 Constitution and Bylaws, Article 1, Boule Officers, Section 4: To be a Candidate for Membership on the Directorate:

- Candidates must be Financial for a period of at least four (4) consecutive year’s immediately preceding candidacy.
- Candidates must be certified via the Alpha Kappa Alpha Leadership Development Training Program
Candidates must have attended at least one (1) of the last two Boule
Candidates must be present at the Boule where the election is held

Required Workshops/Training for Directorate Candidacy:
- Board Member Responsibilities & Code of Conduct
- Constitution ESP
- Parliamentary Procedures
- Protocol
- Rituals
- Financial Workshop-Chapter Budget Management
- Sorority Financial Procedures

Required Workshops/Training for Directorate Candidacy continued:
- Conference Planning
- Candidate Information Session, (conducted after credentials have been cleared)

Sorors should review all hats worn, i.e. professional, personal, and sorority in order to be more effective in leadership and board member roles

What is a Board?
An active and responsible governing body serving without compensation, holding regular meetings and with effective administration control

Role of a Board (examples):
- Should not get involved in the operational details
- Emphasis should be on goals, objectives and policies

Specific Responsibilities examples:
- Provide proper financial oversight
- Maintain accountability

Our Language:
The Officers of the Boule conduct the business of the Board.

Individual Board Member Responsibilities (Examples):
- Be a member in good standing
- Attend all Board Meetings, assigned committee meetings & special meetings
- Make decisions on issues policies goals and objectives based on careful consideration of the facts.

Board Member Expectations (examples):
- Participate Fully
- Criticize when necessary, keeping statements constructive
- Give fully of time
- Serve on Committees
- Support other Board Members
Expected Behaviors of Board Members:
- Actions of a board members must be consistent throughout the sorority
- Decisions on Sorority matters need to be in line with our documents
- A consistent message means you are on track


1. To devote time thought and study to the duties and responsibilities of a Board member so that I may render effective and credible service.

2. To work with my fellow Board members in a spirit of harmony and cooperation in spite of differences of opinion that arises during vigorous debates of points of issues.

3. To base my personal decision upon all available facts in each situation; to vote my honest conviction in every case, without bias of any kind; to abide by and support the final majority decision of the Board.

4. To remember at all times that as an individual I have no legal authority outside the meetings of the Board, and to conduct my relations with the staff, the membership and all media on the basis of this fact.

5. To resist every temptation and outside pressure to use my position as a Board member to benefit either myself or any other individual or agency apart from the total interest of the organization; nor will I use my current position as a platform to campaign for a future Board office.

6. To recognize that it is as important for the Board to understand and evaluate the programmatic functions as it is to plan for the business aspect of the organization.

7. To bear in mind, under all circumstances, that the primary function of the Board is to Establish the policies by which the organization is to be administered, but that the Administration of the staff and the conduct of business operations shall be left to the employed Executive Director and her professional and non-professional staff.

8. To welcome and encourage active communication by the membership with respect to established policy and proposed future developments.

9. To support the various committees in carrying out the constitutional duties assigned.

10. Finally, to strive step-by-step, toward ideal conditions for the most effective Board service in a spirit of teamwork and devotion to Alpha Kappa Alpha and its mission of service to all mankind.
**Constitution ESP Express Workshop**
Soror Trudie E. Carmichael, International Constitution Committee, South Atlantic Region, Lambda Epsilon Omega, Presented
Report by: Soror Mahala Culpepper

This workshop session was designed to enhance sophistication with our keystone documents--documents that every soror is proficient. Keystone documents are absolute and steadfast. They represent rules to maintain order, ensure fairness and facilitate due process.

Keystone documents (The Soul of Alpha Kappa Alpha)
- Constitution and Bylaws
- Manual of Standard Procedure

Bylaws should be written clearly and to the point. Chapter bylaws should be designed to provide clarification and additional details around matters of interest to the chapter. Changes to keystone documents should be made cautiously with deliberate review and analysis.

Keystone documents should never be used to:
- Address personal concerns
- Advance personal agendas

**Soror Code of Conduct:**
Why a Soror Code of Conduct? The Code of Conduct outlines minimum standards for behavior expected of a Soror. When Sorors subscribe to the code it ensures that our beloved sisterhood maintains an impeccable reputation and a high quality of standards. Sorors should not drink in paraphernalia. We need to watch what we wear. Sorors need to stop telling "our" secrets.

**Sisterly Relations Workshop**
Exhibiting Sisterly Practices
Presenter: Soror Evelyn Sample-Oakes, North Atlantic Regional Director, International Standards Directorate Liaison, Rho Theta Omega
Report by: Soror Mahala Culpepper

Overview:
- We can not put sisterly relations on the back burner. We must continue to foster the art of building new relationships and preserving old relationships through a kaleidoscope of sisterly activities. We should respect each other at all times. Out public image ties into how we treat each other. What you see is not always what you get. Someone's perspective will equal their reality.

To be Sisterly is to be:
What Chapters Must Have:
- Sisterly Relations Committee
- Sisterly Relations Retreat
- MIP/No MIP
- Sisterly Relations Activities at Chapter Meeting
- Social Committee (To focus on social activities)

Key Elements of Sisterliness:
- Communication
  - Go directly to the source, don't believe rumors.
  - Allow sorors to lift you.
- Read
  - Remember you pledge and your vow to Alpha Kappa Sorority

Key Elements for Sister-to-Sister Relationships:
- Inspire
- Challenge
- Encourage

Things that could Split a Chapter:
- Budget Issues/Concerns
- MIP
- Elections

New officers should have a leadership planning meeting to develop and share common goals. Due to advances in technology, some sorors may have difficulty communicating. Take this into consideration when planning communications. Anger Management is critical to Sisterly Relations. Remember, it is not about the Chapter, it is about AKA.

Protocol 101:

**Essential Sorority Protocol Understanding**

**Presenter:** Soror Debra Underwood, International Protocol Committee, Central Region, Theta Omega

**Report by:** Soror Wanda Tanner

The session reviewed basic information all sorors should know as outlined in the [Official Guide to Alpha Kappa Alpha Protocol](#). Topics included the Soror Code of Conduct, The Pledge, the National Hymn, and Attire, The AKA Badge, Knowing and using our Symbols, the Destruction of Documents, Chapter Communications, and Protocol for Chapter Members.

Protocol is defined as the method in which every soror should conduct business within Alpha Kappa Alpha Sorority. It is the responsibility of every soror to perpetuate the ideals of the sorority, to carry on our traditions, and to endure consistency in implementing our plans, programs and activities. All sorors should be familiar with our Code of Ethics which is designed to protect our sorority traditions.
With respect to attire, all sorors should wear what is designated for the occasion—Business Attire for chapter meetings and Regional and National Conferences, White and No Pants for Rituals, and Pink and Green for Community Service Projects, Certain Fundraisers, or Rush activities.

One key point emphasized was that when a soror dies, the chapter should make an effort to retrieve the AKA Badge (official pin) and return it to the Corporate Office. This is likely to present challenges, as in many cases the family may elect to bury the pin with the soror, to pass it on to a relative who is a soror, or simply to keep it. Nonetheless, the chapter should make the effort to retrieve it. The official pin should always be worn on the garment that is closest to the heart and should never be worn with formal attire or pants.

There was a lot of discussion about the importance of the proposal disposal of AKA documents to prevent proprietary sorority information from being viewed by non-sorority members. Proper methods of disposal include shredding or burning, Clothing with AKA logos should be burned or cut up.

Sorors are encouraged not to place AKA information on computers that they do not personally own. The use of Flash Drives is strongly encouraged when using computers owned by others. Sorors are encouraged never to use company computers for AKA business, as these computers are company property and may be subpoenaed in any lawsuit brought against the company. Deleted information may be retrieved. Our proprietary information would then be available for viewing by personnel who are not members of the sorority.

Chapter stationary should always be ordered from the Corporate Office. Chapters should not create their own stationary. The Chapter name should always follow Alpha Kappa Alpha Sorority, Inc on the stationary. It is just the opposite for Foundations. The foundation name should be followed by Alpha Kappa Alpha, Inc. Press releases should be on either Chapter of Foundation Stationary. All letters from the Chapter must be reviewed and approved by the Basileus before being sent.

**Protocol for Chapter Members:** All requirements are listed in the *Official Guide to AKA Protocol*, but these seem worth noting:

- Attend all leadership training sessions
- Commit to cooperate with Chapter Leadership
- Complete Assignments in a timely manner
- Maintain Chapter Business within the Chapter
- Fulfill all Financial Obligations
- Warmly Welcome and embrace Visitors and Guests
Protocol 102:
Exemplary Sorority Protocol—Beyond the Basics
Presenter: Soror Victoria Jenkins, International Protocol Committee, South Atlantic Region, Nu Lambda Omega
Report by: Soror Wanda Tanner

This was a more advanced session on Protocol that was designed for Protocol Chairman and Sorors interested in Regional Protocol. The focus of the discussion was on the appropriate way to make Introductions of Sorority Leadership, Options for Dias Seating, Holding Room Decorum, Gifts Courtesies, and Protocol responsibilities during Regional and National meetings.

The Chapter Protocol Committee should work cooperatively with all of the other Committees within the chapter to ensure that things are being handled appropriately. The Protocol Committee should participate in event planning, assist in determining logistics, transportation, hospitality, planning rituals, selecting and purchasing gifts, planning introductions, etc. Since Protocol changes, it is important to be able rely on designed Chapter personnel to keep current with the latest updates.

Communications - Every Source Penetrated
Soror Andrea Robinson, International Communications Committee, South Atlantic Region, Gamma Zeta Omega, Presented
Report by: Soror Nikki Roberson
Actionable Objectives
- Heighten the sorority's media visibility
- Strengthen media ties
- Communicate our message
- Shape public opinion
- Empower our members
- Underscore our service/program initiatives

Value of Media Relations
- What Can Media Outreach Do?
  - Project a positive image about our sorority
  - Educate public about who we are
  - Identify chapter members as a source of information
- Provide balanced commentary
- Advance legislative agenda

Why Our Views Are Important to the Press
- Chapter members have:
  - Direct contact with clients seeking our services
  - Intimate knowledge of the needs of the communities in which we serve
  - Broader perspective as liaison between the community and the broader community

Nuts and Bolts of Media Relations: Know your local media
- Types
  - Daily and weekly newspapers
  - Wireservices
  - Trade publications
  - Organization newsletters
  - Broadcast Media
  - Social Networks
  - Blogs

Print Media
Choose most appropriate contacts
- Choose sections related to sorority issues in:
  - Business
  - Health/medical
  - Government/legislative
  - Metro news
  - Features
- Who you contact is fundamental in the success of your media effort

Broadcast Media
TV & Radio
- Types of Programs
  - News
  - Talk Show
  - Topical/features
- Who you Contact
  - News directors
  - Assignment editors
  - Program producers
  - On-air reporters

Distinctions Between Print and Broadcast
- Print
  - Allows more in-depth coverage
  - Often more lead time
  - Great range of venues
- Broadcast
  - Sound bites – message must be more concise
  - Must have experienced spokesperson

Opportunities for Visibility
- Chapter News
  - Legislative Activities
  - Legislative Bills
  - Meetings with Governor or legislators
  - Awards, Member Professional Achievements
  - Charitable Activities
  - Speaking Engagements
  - Public Hearings
  - Client Features/Stories
- Feature Material
  - Consumer Tips or Advice
- National News
  - Reprints
  - Local Impact
Preparation Publicity:
- **What is the news?**
- **Who is the audience?**
- **Look for opportunities**
- **What level of Media is Required?**
  - National
  - State
  - Local

Preparation Publicity:
- **STATE**
  - Scope of news or event is only of interest statewide
  - Coordinate with chapters in nearby clusters

- **LOCAL**
  - Scope of news or event is only of local interest
  - Obtain resources from region’s office
  - Coordinate and obtain resources from AKA

Tools of the Trade:
- **When and how to use the tools**
  - Building a press list
  - Letter of introduction
  - Press release
  - Media advisory
  - Photo
  - Letter to the editor
  - Editorial/Op-Ed
  - Bylined article

Content:
- **Localize story or issue**
  - Refer to local people and how issue will affect them and local businesses
  - Use quotes from local people about the story

- **Craft meaningful, short messages with relevance to the community**
- **Tell why it is relevant with facts/statistics, and tangible examples**

Initiating the Media Process Step by Step:
- **Finding the Right Media Outlets**
  - Put together a media list. Local libraries will have media directories that list reporters. Check whether the Corporate Office has access through PR Newswire to current media lists by state and subject matter.

- **List should include print, television and radio reporters. Remember to also include weekly and community newspapers.**
- **Make sure to include name, phone number, fax number, e-mail address.**

When and How to Use the Tools:
- **Letter of introduction**
  - Your credentials
  - Topics/issues you can address
  - An offer to provide a background briefing
  - Contact number, e-mail address

- **Follow up by phone with every contact...just like sales!**

Press Release – Announces “news”
- Include contact information and date of release
- Include an eye-catching “headline” that captures the “essence” of the news
- Describe the “core” news message in first paragraph (who, what, when, where, why)
- Expand the news story in following paragraphs
- Include a quote from a recognized spokesperson in the organization
- Close with a “boilerplate” paragraph about the organization announcing the news
- Limit to 1 or 1½ pages
When and How to Use the Tools

- **Media Advisory** – Announces an upcoming news event or offers a resource person to address a current “hot” issue.
  - Include an eye-catching “headline”
  - Distribute several days in advance of the news event
  - Use a “What, When, Where, Why” format
  - Bullet the main points
  - Provide contact information and date

- **Letter to the Editor** – Responds to an article or editorial that has appeared in a publication.
  - Make certain it relates directly to the topic
  - Include name of article, date and page for reference
  - Be concise and brief
  - Share your unique perspective
  - Give examples
  - Close with your name, title and affiliation
  (Advance Chapter approval required if identified)

- **Bylined Article** – A lengthier article (primarily used in trade publications) authored by an organization’s staff or member on a topical issue.
  - Offer to write an article for the publication
  - Do not prepare an article without discussing it with the editor

When and How to Use the Tools

- **Photograph** – Attach a “cutline” to the photo that identifies the person(s) in the photo and describes what is pictured.
  - Include with appropriate news announcements (promotion, awards, partnerships)
  - Ask the reporter how they want the photo sent to them (i.e., jpeg, tif, eps, etc.)

- **Op-Ed** – An “opinion piece” submitted by an individual or on behalf of an organization to a publication. Placement can be paid for or a publication may decide to publish on its own.
  - Needs to be linked to a topical issue of interest
  - Offers a unique perspective
  - Is brief (usually 300-600 words)
  - Includes name of author and affiliation

Building and Maintaining Relationships

- **Network and share your news**
- **Offer yourself as a resource**
- **Localize national AKA announcements/press releases and distribute**
- **Arrange meetings with editors of media departments**
- **Send “thank you” notes following an interview**
- **Send personal notes and include articles of interest**

Regional Objectives & Successes

- **My Leaf Submissions**
- **ESP Success Stories**
- **National Web site**
- **Regional Media Coverage**

**SUCCESSES**

- Coverage at Regional Conferences
- PR Plan for Conferences
- Rosa L. Parks Historical Marker (Montgomery)
- 1908 Global Centennial Walk
- Get Out The Vote
- Day at the Capitol
- Memoplate releases for clusters, undergraduate round, regional and other regional activities

National Objectives & Successes

- **Weekend ESP Success Stories**
- **AKA Media Guide**
- **Community Involvement and with sponsors**
- **SNAP Award for Outstanding Media Excellence**
- **Sustained A. Addams Award for Media Excellence**

The Communications apparatus is two-pronged: The International Communications Committee scrutinizes national issues, the Region Information Officer (RIO) reports on news impacting the region.

- We were extremely successful in promoting AKA’s progressive media presence nationwide. Several times, we secured coverage for our media relations efforts in the mainstream media, including on Good Morning America, CBN’s Saturday Morning Show, a story on CNN, coverage in the New York Times, Essence, Jet, Ebony, interviews on the Al Sharpton Show, coverage in the Miami Herald, Philadelphia Inquirer, Chicago Tribune, Chicago Sun Times and two appearances on the Today Show morning show.

The total would be in excess of 350 appearances.
Role of the Chapter

- Elect an Ivy Leaf Reporter/Public Relations Chair at the chapter level
- Make your chapter a resource by publicizing:
  - Events
  - Member Accomplishments
  - Encourage chapter members to join and network with local business organizations
  - Remember to include a line about the region and national efforts in all press releases
  - Regularly submit news to Ivy Leaf magazine
  - Contact the IO for any news that may have a regional or national impact

Conclusion

The Information Officer team of Alpha Kappa Alpha promotes news of regional and national significance.

We also are a resource for chapters that may need help developing a media plan.

We will assist, but YOU have to make it work.

And remember, Every Soror Publicizes!

Communications Org Chart

Got Questions?

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2010 South Atlantic Regional Conference DELEGATES
Sandra D. Kenon, Basileus
Ora Douglass, Anti Basileus
Mavis Bradley
Alline Clancy
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Wanda Tanner