

ZETA PHI BETA SORORITY, INC.



FISCAL YEAR  
2013-2014

CHAPTER  
MANAGEMENT  
DOCUMENTS

# ZETA PHI BETA SORORITY, INC.



August 2013

Greetings Chapter Basilei and/or Administrators,

Welcome to Zeta Phi Beta Sorority, Inc. Fiscal Year (FY) 2013-2014. This fiscal year the sisterhood will experience assessments, new technology and migration to a new database that encourages us to embrace change, improve processes and procedures moving us forward in our principle charge of Service, Scholarship, Sisterhood and Finer Womanhood.

The enclosed FY2013-2014 Chapter Management Packet, contains pertinent information critical to a chapter's ability to operate within our governing rules and guidelines throughout the year and build upon stronger business practices. I urge you and your chapter's executive board to review this packet which will help you meet the changes leadership has asked and for your chapter to deliver a solid product.

Sorors, as we build on these strong principles of Zeta, I ask all of you to be active participants in your communities where Zeta *will* blaze new paths.

Have a productive year!

Sisterly,

Stacye Montez  
Executive Director

## AUGUST

FY 2013/2014 dues and assessment  
Chapters prepare for Audit/990  
Retreat (Chapter/Regional Director)

## SEPTEMBER

Continue collecting FY2013/2014 dues Assessment  
Chapters finalize 990 form – submit  
2 – Headquarters Closed Labor Day  
18 - Zeta Day on the Hill  
**30 – Insurance Invoice Due**

## OCTOBER

**31-Deadline for membership dues/assessment to Headquarters**  
Chapter 990 Forms completed and submitted to IRS  
Prepare Chapter for March of Dimes Pre-Maturity Month  
Prepare Chapter Text for Babies  
Prepare for Founders Day Celebration  
Prepare Chapter for the Finer Womanhood Month Celebration  
ATLANTIC REGIONAL CONFERENCE

## NOVEMBER

**15 – Chapter 990 Forms are due to the IRS**  
Late Assessments on Dues – Chapters invoiced  
March of Dimes Pre-Maturity Month  
21 – 24 Headquarters closed Thanksgiving Observance  
Finalize Founders Day Celebration  
Prepare Chapter for the Finer Womanhood Month Celebration  
SOUTHEASTERN REGIONAL MEETING

## DECEMBER

Late Assessments on Dues – Chapters will be invoiced  
24&25 - Headquarters closed (Christmas Observance)  
31 - DEADLINE FOR NEW LIFE MEMBERS / DIAMOND applications  
Finalize Founders Day Celebration  
Prepare Chapter for the Finer Womanhood Month Celebration  
Merry Christmas – Happy New Year

## JANUARY

Late Assessments on Dues – Chapters invoiced  
1 – Headquarters closed (New Years Day Observance)  
National Executive Board Meeting - Washington DC  
16 - Founders Day Observance  
16 - Finer Womanhood Reclamation Begins  
21 - Headquarters closed (Martin Luther King, Jr.)  
Finalize Finer Womanhood Month Celebration  
Prepare Chapter: MOD Walk for Babies

ZETA PHI BETA SORORITY, INCORPORATED  
CHAPTER MANAGEMENT – FISCAL YEAR 2013/2014

FEBRUARY

Late Assessments on Dues – Chapters invoiced  
Prepare Chapter: MOD Walk for Babies  
17 - Headquarters Closed (Presidents Day )  
24 - Finer Womanhood Celebration Month continues

MARCH

March of Dimes March for Babies  
Late Assessments on Dues – Chapters invoiced  
Prepare Chapter for FY2013/2014 dues assessment  
31 – Reclamation/Finer Womanhood  
Celebration Ends  
EASTERN REGIONAL CONFERENCE

APRIL

March of Dimes March of Babies  
Late Assessments Dues-Chapters invoiced  
Begin to Collect FY2014/2015 Dues Assessment  
Prepare for 2014/2015 MIP  
GREAT LAKES REGIONAL CONFERENCE  
PACIFIC REGION EXECUTIVE BOARD MEETING  
MIDWESTERN REGIONAL CONFERENCE

MAY

Late Assessments Dues-Chapters invoiced  
Begin to Collect FY2014/2015 Dues Assessment  
Prepare for 2014/2015 MIP  
26 – Headquarters Closed (Memorial Day)

JUNE

Begin to Collect FY2014/2015 Dues Assessment  
Prepare for 2014/2015 MIP  
SOUTH CENTRAL REGIONAL CONFERENCE  
SOUTHERN REGIONAL CONFERENCE

JULY (2014)

BOULE – Washington, D.C.

## CRITICAL INFORMATION

### TECHNOLOGY

Initiate phase one of Database Migration with financial form B via Chapter Tamias Grammateus  
New Website (Summer 2013)  
Migrating to Digital Archival System (FYI 2013/2014)  
HQ hardware upgrade

### HEADQUARTERS TOUR

Tours of our National Headquarters are temporarily suspended for the summer and fall months as a building assessment is being conducted.

### “FINANCIAL”

A member is considered financial when they have paid their dues on all levels (national, regional, state and local).

### FINANCIAL ASSESSMENTS FORMS A/B

Please read carefully and fully complete the information on the forms they have been changed. Any use of old forms will be returned to the Chapter and required to submit information on the new form. Chapters are required to keep a list of unfinancial members for at least five years, and include any update on name changes (include maiden name for cross reference), address change, etc.

### PENDING STATUS

Chapters submitting reports with incomplete fees and paperwork (transfer cards) will be recorded in the database as Pending. Chapters will remain in a **Pending** status until all fees are received and no MIP will be permitted. Chapters that do not satisfy the **Pending** status of their reports before the end of the fiscal year will be required to pay past and current fees before becoming financial for the new fiscal year. Regional and State Directors will be notified of Pending Chapter Status.

### LATE FEES

**Financial Reports A & B must be received by October 31.** Any reports submitted thereafter will be assessed late fees: \$15.00 per member and \$10.00 per month for each chapter. Chapters will receive monthly invoices until their debt is cleared.

### ACCEPTABLE FORMS OF PAYMENT

Acceptable forms of payment include money orders, cashier's checks and major credit cards. Please type in your responses. Handwritten forms will take longer to process.

Mail Financial Reporting Forms A&B and related reports to:

Zeta Phi Beta Sorority  
PO Box 100125  
Client ID#900036  
Columbia, SC 29202-3125

**NEW GRADUATE  
MEMBER FEE**

Undergraduate members are eligible for transitioning to the new graduate member fee of \$145.00 for two years. Members qualifying for this fee must have graduated from an accredited college or university and immediately transfer into a graduate chapter (no later than the next fiscal year). A one-time transfer fee of \$5.00 is required for the first year only.

**TRANSFER CARDS**

To transfer from one chapter to another, complete a transfer card and submit a \$5.00 fee. A notarized letter is acceptable if a member is unable to secure a transfer card from previous chapter. ***When submitting financial reporting forms to headquarters, chapters must submit copies of all transfer cards and Notarized letters.***

**\*RECLAMATION  
FEES**

A member who has been inactive for two years or more is entitled to pay the fee of \$255.00 per Graduate Member, \$180 per Undergraduate Member.

**A member who has been inactive for two or more years during January 16 – March 31 is entitled to pay the reduced fee of \$195.00 which is our Finer Womanhood Observance. This fee is for both Graduate and Undergraduate.**

**MEMBER-AT-LARGE**

Members interested in becoming a Member-At-Large (MAL) must submit their request in writing to the attention of the Executive Director. The International Grand Basileus, upon a written request, may grant this status. **Her approval must be given before fees can be submitted.**

**NEWLY  
CHARTERED CHAPTERS**

As new chapters are chartered, National Headquarters will only provide the name to the Regional Director.

**990 FILING / EIN#**

All chapters are required to have Employer Identification Numbers (EIN). New Chapters can request the EIN paperwork from Ms. Carolyn McCorkle at Headquarters. ALL FORMS must be submitted directly to IRS. **Headquarters DOES NOT FILE ANY 990 FORMS on behalf of the chapter.** The IRS requires all chapters to file their own 990 forms. To obtain a copy of your chapter's EIN you must submit a written request to the Executive Director.

**CHAPTER  
REINSTATEMENT FEES**

A chapter inactive for two years or less is required to pay chapter and individual taxes for both years of inactivity. Refer to Financial Form A for fees associated with chapter size. Please see the chapter management folder for forms to reactivate a chapter. Send completed forms to the State and Regional Director for approval and signature. A chapter is considered inactive if it has been unfinancial for three or more years. Reinstated chapters are required to pay a reinstatement fee of \$50 the current chapter tax fee and the per capita fee for all chapter members. Non-Zetas must be members before the chapter reactivates therefore, please make sure you have submitted paperwork to the office of the National First-Anti if you are reactivating a chapter with new members. Refer to Financial Form A for chapter tax fees relevant to your chapter size. A chapter inactive for two years or less is required for both years. Refer to Financial Form A for fees associated with chapter size.

**INSURANCE FEES**

Zeta has changed insurance carriers. Under the previous insurance carrier, you were accustomed to paying a nominal fee to that insurance carrier. **That practice has changed.** Chapters, States and Regions will now pay insurance fees directly to Zeta Phi Beta Sorority, Inc.

The following outlines the payment schedule plan and the options that are available.

ONE TIME ONLY	FEE	
Chapters for FY 2013/2014 (one time fee for all events in the FY 2013/2014)	\$350.00	
Regions for FY 2013/2014 (one time fee for all events in FY 2013/2014)	\$1000.00	**** This includes state events
CHAPTERS/REGIONS/STATES A – LA- CARTE	\$150.00 FOR EACH EVENT	

The insurance fees for Fiscal Year 2013 – 2014 are as follows:  
**ONE TIME ONLY FEE FOR ALL EVENTS:** \$350.00  
 (Attached invoice must be received by 09/30/2013 to participate in program)

REGIONS FOR ALL EVENTS: \$1000  
 STATES: (Please contact your Regional Directors)

**A – LA- CARTE**  
 Chapters, States and Regions opting out of the *ONE TIME ONLY FEE* will pay an a-la-carte fee of \$150.00 per event.

EXAMPLE:

Chi Chi Chi Chapter meeting place for entire year	\$150.00
Chi Chi Chi Chapter March for Babies	\$150.00
Chi Chi Chi Chapter Founders Day Soiree	\$150.00
Chi Chi Chi Chapter Finer Womanhood Banquet	\$150.00
<b>TOTAL for Chi Chi Chi Chapter:</b>	<b>\$600.00</b>

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 All **ONE TIME ONLY** Invoices must be received with payment by **September 30, 2013**. Invoices Postmarked on September 30, 2013 will not be accepted.