

# North Carolina Phi Beta Lambda

## State Handbook Book

### Table of Contents

<b>SECTION 01 - CHAPTER GUIDE with CALENDAR, STATE GOALS, AND MEMBERSHIP REPORTING</b>	
	SECTION 01 PAGE
NCPBL CALENDAR .....	5
IMPORTANT PBL CHAPTER DATES AND DEADLINES .....	5
SCHEDULE OF CONFERENCES AND MEETINGS .....	9
CHAPTER GUIDE .....	11
NCPBL—GET THE EDGE.....	11
FBLA-PBL, INC. ....	11
INITIATIVE.....	11
MANAGERS.....	12
GET THE EDGE .....	13
MEMBERS...THE DRIVING FORCE .....	13
NCPBL—GET THE EDGE.....	14
MEMBERSHIP DUES REPORTING PROCEDURES .....	15
MEMBERSHIP REPORTING MATERIALS NEEDED.....	15
PBL MEMBERSHIP REPORTING DEADLINES .....	15
PD MEMBERSHIP REPORTING DEADLINES .....	15
MEMBERSHIP REPORTING PROCEDURES.....	16
FOR STUDENT MEMBERSHIP .....	16
FOR PD MEMBERSHIP .....	16
GOALS FOR 2008-2009 .....	17
I. RECRUITMENT OF MEMBERS AND CHAPTERS .....	17
II. STATE OFFICER ASSISTANCE TO LOCAL MEMBERS.....	17
III. PREPARATION OF STATE AND LOCAL OFFICERS FOR THEIR DUTIES .....	17
IV. COOPERATION WITH BUSINESS, PROFESSIONAL, AND SERVICE GROUPS WITHIN THE COMMUNITY.....	18
V. PARTICIPATION IN PUBLIC RELATIONS ACTIVITIES, PREPARATION OF A NEWSLETTER.....	18
VI. DEVELOPMENT AND PROMOTION OF FBLA-PBL STATE PROJECTS .....	18
VII. SUPPORT OF FBLA-PBL NATIONAL PROJECTS .....	19
VIII. IMPLEMENTATION OF STATE LEADERSHIP CONFERENCES.....	19
IX. ATTENDANCE AND PARTICIPATION AT CONFERENCES SPONSORED BY THE NATIONAL ASSOCIATION.....	19

**SECTION 02 – STATE CHAPTER DIRECTORY**

	SECTION 02 PAGE
NCPBL QUICK REFERENCE GUIDE .....	5
2008-2009 STATE EXECUTIVE COUNCIL .....	6
STATE OFFICERS.....	6
STATE COMMITTEE .....	7
PROFESSIONAL DIVISION OFFICERS .....	7
NCPBL FOUNDATION, INC., OFFICERS .....	8
NATIONAL POSITIONS HELD BY NORTH CAROLINA REPRESENTATIVES.....	8
ACTIVE LOCAL CHAPTERS BY REGION .....	10
INACTIVE LOCAL CHAPTER BY REGION .....	11
LOCAL CHAPTER DIRECTORY .....	12
CHRONOLOGICAL LOCAL CHAPTER CHARTERING HISTORY .....	25
2008-2009 ANNIVERSARIES .....	27

## SECTION 03 –GENERAL INFORMATION

	SECTION 03 PAGE
WHAT IS PHI BETA LAMBDA .....	4
THE GOALS OF PHI BETA LAMBDA ARE TO .....	5
PHI BETA LAMBDA PLEDGE .....	5
PHI BETA LAMBDA CODE OF ETHICS.....	5
PHI BETA LAMBDA CREED .....	5
BENEFITS OF PHI BETA LAMBDA MEMBERSHIP .....	5
NORTH CAROLINA PHI BETA LAMBDA HISTORY.....	6
STATE CHAPTER STRUCTURE AND OPERATIONS ORGANIZATIONAL STRUCTURE .....	7
STATE EXECUTIVE COUNCIL.....	7
FINANCIAL STATEMENTS .....	8
REGIONAL STRUCTURE.....	8
STATE CHAPTER GOALS .....	8
STATE NEWSLETTER .....	8
STATE CHAPTER ANNUAL BUSINESS REPORT.....	8
ADMINISTRATIVE STRUCTURE STATE COMMITTEE TASK SPECIALIZATION .....	8
LOCAL CHAPTER BUSINESS ADVISORY COUNCIL .....	9
HOW TO FORM YOUR BUSINESS ADVISORY COUNCIL .....	9
CHAPTER ACTIVITIES .....	9
SERVICE PROJECTS .....	10
PROFESSIONAL PROJECTS.....	10
FUND-RAISING PROJECTS .....	10
LEADERSHIP CONFERENCES.....	10
NCPBL FALL KICK-OFF MEETINGS.....	11
NCPBL FALL LEADERSHIP DEVELOPMENT CONFERENCE (FLDC) .....	11
NATIONAL FALL LEADERSHIP CONFERENCE (NFLC).....	11
NCPBL WINTER TIP-OFF MEETINGS .....	11
STATE LEADERSHIP CONFERENCE (SLC) .....	11
STATE LEADERSHIP CONFERENCE GENERAL INFORMATION .....	12
ADMINISTRATION OF EVENTS .....	12
RULES AND REGULATIONS .....	12
NATIONAL LEADERSHIP CONFERENCE (NLC).....	12
INSTITUTE FOR LEADERS (IFL).....	13
CHARTERING OR REACTIVATING CHAPTERS OF NORTH CAROLINA PHI BETA LAMBDA .....	13
CHRONOLOGY OF STATE CHAPTER OFFICERS .....	13
CHRONOLOGY OF STATE COMMITTEE OFFICERS .....	13
CHRONOLOGY OF PROFESSIONAL DIVISION OFFICERS .....	13
CHRONOLOGY OF THE NCPBL FOUNDATION, INC., OFFICERS AND BOARD MEMBERS.....	13
NCPBL CONFERENCE DRESS CODE .....	14

**SECTION 04 –CONSTITUTION AND BY-LAWS**

**SECTION 04 PAGE**

CONSTITUTION.....5

ARTICLE I. NAME .....5

ARTICLE II. PURPOSE .....5

ARTICLE III. MEMBERSHIP .....5

ARTICLE IV. DUES AND FINANCE.....5

ARTICLE V. ORGANIZATION .....6

ARTICLE VII. EMBLEMS AND INSIGNIA .....6

ARTICLE VII. AMENDMENT .....6

BYLAWS .....7

ARTICLE I. NAME .....7

ARTICLE II. PURPOSE .....7

ARTICLE III. MEMBERSHIP .....7

ARTICLE IV. DUES AND FINANCE.....7

ARTICLE V. ORGANIZATION .....8

ARTICLE VI. EXECUTIVE COUNCIL.....9

ARTICLE VII. OFFICERS AND ELECTIONS .....9

ARTICLE VIII. DUTIES OF STATE OFFICERS .....11

ARTICLE IX. MEETINGS .....11

ARTICLE X. RULES, REGULATIONS, AND POLICIES .....12

ARTICLE XI. AMENDMENTS .....12

**SECTION 05 –LOCAL CHAPTER STRUCTURE AND MANAGEMENT**

SECTION 05 PAGE

LOCAL CHAPTER STRUCTURE AND MANAGEMENT .....5

RESPONSIBILITIES OF LOCAL CHAPTER OFFICERS.....5

    GENERAL RESPONSIBILITIES.....5

SUGGESTED OFFICERS AND DUTIES.....5

    PRESIDENT.....5

    VICE PRESIDENT.....6

    THE VICE PRESIDENT AND COMMITTEES .....6

    SECRETARY .....6

    TREASURER.....8

    REPORTER .....9

    HISTORIAN.....9

    PARLIAMENTARIAN .....9

SUGGESTED ORDER OF BUSINESS FOR CHAPTER MEETING .....9

CHAPTER COMMITTEES.....9

    WHO NEEDS THEM? .....9

    WHO APPOINT THEM?.....10

**SECTION 06 –CHAPTER CHARTERING AND REACTIVATION GUIDE**

	SECTION 06 PAGE
GREETING TO PROSPECTIVE NEW AND REACTIVATING CHAPTERS .....	5
THIRTEEN STEPS FOR CHARTERING OR REACTIVATING A CHAPTER .....	7
CHARTERING INFORMATION REQUEST FORM .....	9
APPLICATION FOR NEW OR REACTIVATING CHAPTER.....	10
INITIAL MEMBERSHP REPORTING FORM .....	13
2008-2009 MEMBERSHIP REPORTING FORM .....	15
CHAPTER MANAGEMENT TEAM .....	17
MEMBERSHIP FORM .....	19
SAMPLE MEMBERSHIP APPLICATION FORM .....	21
SAMPLE LOCAL CHAPTER BYLAWS.....	22
INSTALLATION SCRIPTS .....	26
CHAPTER MEMBER INSTALLATION SERVICE SCRIPT .....	27
OFFICER INSTALLATION SERVICE SCRIPT .....	29
PRESENTATION OF CHAPTER SCRIPT .....	32

## SECTION 07 –STATE AWARDS PROGRAM

	SECTION 07 PAGE
STATE AWARDS PROGRAM .....	5
INDIVIDUAL EVENTS .....	5
TEAM EVENTS.....	6
CHAPTER EVENTS .....	6
SPECIAL INDIVIDUAL EVENTS .....	6
RECOGNITION EVENTS.....	7
REGIONAL AWARDS.....	7
NATIONAL AWARDS PROGRAM CHANGES FOR 2008-2009.....	7
NEW EVENTS .....	7
COMPETITIVE EVENTS REVISIONS/MODIFICATIONS.....	7
ADMINISTRATIVE AND PROCEDURAL REMINDERS .....	8
COMPETITIVE EVENTS RULES AND REGULATIONS .....	9
NORTH CAROLINA STATE CHAPTER EVENTS .....	11
NCPBL STATE AWARDS PROGRAM EVENT GUIDELINES .....	13
ACCOUNTING ANALYSIS & DECISION MAKING .....	13
ACCOUNTING PRINCIPLES.....	13
ACCOUNTING FOR PROFESSIONALS .....	13
BUSINESS COMMUNICATION.....	13
BUSINESS DECISION MAKING.....	13
BUSINESS ETHICS .....	13
BUSINESS LAW.....	14
BUSINESS PRESENTATION .....	14
CLIENT SERVICE .....	14
COMMUNITY SERVICE PROJECT .....	14
COMPUTER APPLICATIONS .....	14
COMPUTER CONCEPTS .....	14
CONTEMPORARY SPORTS ISSUES.....	14
CYBER SECURITY .....	14
DATABASE DESIGN & APPLICATIONS .....	14
DESKTOP APPLICATIONS PROGRAMMING .....	14
DESKTOP PUBLISHING .....	14
DIGITAL VIDEO PRODUCTION .....	15
E-BUSINESS.....	15
ECONOMIC ANALYSIS & DECISION MAKING.....	15
EMERGING BUSINESS ISSUES .....	16
FINANCIAL ANALYSIS & DECISION MAKING.....	16
FINANCIAL CONCEPTS.....	16
FINANCIAL SERVICES.....	16
FREE ENTERPRISE PROJECT .....	16
FUTURE BUSINESS EXECUTIVE .....	16
FUTURE BUSINESS TEACHER .....	16
HELP DESK .....	17

HOSPITALITY MANAGEMENT .....	17
HUMAN RESOURCE MANAGEMENT.....	17
IMPROMPTU SPEAKING.....	17
INFORMATION MANAGEMENT.....	17
INTERNATIONAL BUSINESS.....	17
INTERNET APPLICATION PROGRAMMING.....	17
JOB INTERVIEW .....	17
JUSTICE ADMINISTRATION.....	18
LOCAL CHAPTER ANNUAL BUSINESS REPORT.....	18
MACROECONOMICS.....	18
MANAGEMENT ANALYSIS & DECISION MAKING .....	18
MANAGEMENT CONCEPTS .....	18
MARKETING ANALYSIS & DECISION MAKING .....	18
MARKETING CONCEPTS .....	18
MICROECONOMICS .....	18
NETWORK DESIGN .....	18
NETWORKING CONCEPTS .....	18
PARLIAMENTARY PROCEDURE.....	19
PROJECT MANAGEMENT .....	19
PUBLIC SPEAKING .....	19
SALES PRESENTATION.....	19
SMALL BUSINESS MANAGEMENT PLAN .....	19
SPORTS MANAGEMENT AND MARKETING.....	19
STATISTICAL ANALYSIS.....	20
TELECOMMUNICATIONS.....	20
WEB SITE DEVELOPMENT .....	20
WORD PROCESSING.....	20
OTHER STATE AWARDS AND RECOGNITION EVENTS .....	21
TERRY LOWRANCE LEADERSHIP AWARD .....	21
NORTH CAROLINA BUSINESSPERSON OF THE YEAR .....	22
NORTH CAROLINA GOLD SEAL CHAPTER AWARD .....	23
LARGEST LOCAL CHAPTER MEMBERSHIP .....	23
LARGEST INCREASE IN LOCAL CHAPTER MEMBERSHIP .....	24
LARGEST PERCENTAGE OF INCREASE IN LOCAL MEMBERSHIP .....	24
WHO'S WHO IN NORTH CAROLINA PHI BETA LAMBDA.....	25
THE NORTH CAROLINA PHI BETA LAMBDA FOUNDATION, INC., SCHOLARSHIP.....	26
LOCAL RECRUITMENT OF CHAPTERS .....	27
LARGEST LOCAL CHAPTER MEMBERSHIP—PROFESSIONAL DIVISION.....	27
LOCAL RECRUITMENT OF PROFESSIONAL DIVISION MEMBERS.....	28
PROFESSIONAL DIVISION CHAPTER OF THE YEAR .....	28
NORTH CAROLINA PHI BETA LAMBDA PROFESSIONAL DIVISION DISTINGUISHED SERVICE AWARD.....	29
NORTH CAROLINA PHI BETA LAMBDA HONARY LIFE MEMBERSHIP .....	29

**SECTION 08 –TERRY LOWRANCE LEADERSHIP AWARD**

SECTION 08 PAGE

2008-2009 NCPBL TERRY LOWRANCE LEADERSHIP AWARD.....6

**SECTION 09 –STATE OFFICER CANDIDATE GUIDE**

**SECTION 09 PAGE**

THE NORTH CAROLINA STATE CHAPTER OF PHI BETA LAMBDA .....5  
QUALIFICATIONS FOR STATE OFFICE .....5  
DUTIES OF ELECTED STATE OFFICERS .....6  
    PRESIDENT.....6  
    REGIONAL VICE PRESIDENTS .....6  
    SECRETARY/TREASURER .....6  
    HISTORIAN.....6  
PROCEDURES FOR FILING STATE OFFICER CANDIDATE NOMINATIONS .....6  
ELECTION RULES, REGULATIONS, AND PROCEDURES .....7  
    RULES AND REGULATIONS .....7  
    PROCEDURES.....8  
ADVISER INFORMATION .....8  
IF YOU ARE ELECTED .....8  
THE NORTH CAROLINA STATE CHAPTER OF PHI BETA LAMBDA TRAVEL AND EXPENSE POLICIES .9  
    TRANSPORTATION .....9  
    MEALS .....9  
    LODGING .....9  
    OFFICER TRAVEL .....9  
    CONFERENCES .....10  
    MISCELLANEOUS .....10  
    REPORTING EXPENSES .....10  
PROCEDURES FOR FILING NATIONAL OFFICER CANDIDATE NOMINATIONS .....10  
REQUEST FOR PAYMENT OR REIMBURSEMENT .....11  
STATE OFFICER NOMINATION INTENT FORM .....12  
OFFICIAL NOMINATION FOR STATE OFFICE .....13  
STATE OFFICER CODE OF CONDUCT .....14

**SECTION 10 –SUPPORT ORGANIZATIONS**

	SECTION 10 PAGE
THE HISTORY OF THE NORTH CAROLINA PHI BETA LAMBDA PROFESSIONAL DIVISION .....	5
NCPBL PROFESSIONAL DIVISION 2008-2009 GOALS.....	6
NCPBL PROFESSIONAL DIVISION CODE OF ETHICS.....	7
NCPBL PROFESSIONAL DIVISION AMBASSADOR PROGRAM.....	8
NCPBL PROFESSIONAL DIVISION BYLAWS.....	10
ARTICLE I.    NAME .....	10
ARTICLE II.   PURPOSE .....	10
ARTICLE III.  MEMBERSHIP .....	10
ARTICLE IV.  DUES AND FINANCE.....	10
ARTICLE V.   OFFICERS AND ELECTIONS .....	11
ARTICLE VI.  MEETINGS .....	11
ARTICLE VII. EXECUTIVE COUNCIL MEETINGS .....	12
ARTICLE VIII. COMMITTEES .....	12
ARTICLE IX.  EMBLEMS AND INSIGNIA.....	12
ARTICLE X.   PARLIAMENTARY AUTHORITY .....	12
ARTICLE XI.  AMENDMENT .....	12
THE HISTORY OF THE NORTH CAROLINA PHI BETA LAMBDA FOUNDATION, INC.....	13
THE NORTH CAROLINA PHI BETA LAMBDA FOUNDATION, INC., BYLAWS .....	14
ARTICLE I.   PURPOSE .....	14
ARTICLE II.  OFFICES .....	14
ARTICLE III. MEMBERSHIP .....	14
ARTICLE IV.  LIABILITIES OF MEMBERS.....	15
ARTICLE V.   BOARD OF DIRECTORS .....	15
ARTICLE VI.  OFFICERS AND ELECTIONS .....	15
ARTICLE VIII. COMPENSATION.....	17
ARTICLE IX.  EXECUTIVE COMMITTEE .....	17
ARTICLE X.   FISCAL YEAR.....	17
ARTICLE XI.  AMENDMENTS .....	17

**SECTION 11 –COMPETITIVE EVENT WINNERS 2007-2008**

	SECTION 11 PAGE
2007 FALL LEADERSHIP DEVELOPMENT CONFERENCE AWARDS .....	5
2008 SLC COMPETITIVE EVENT WINNERS .....	7
2008 NCPBL SLC REGIONAL AWARDS .....	18
2008 STATE CHAPTER GOALS RECOGNITION .....	20
2008 MEMBERSHIP RECOGNITION AWARDS .....	21
2008 NATIONAL LEADERSHIP CONFERENCE .....	22

**APPENDIX 01 –HISTORICAL DATA**

	APPENDIX 01 PAGE
HONORARY LIFE MEMBERS .....	5
YEARLY MEMBERSHIP HISTORY .....	6
STATE CHAPTER ANNUAL MEMBERSHIP STATISTICS.....	7
PROFESSIONAL DIVISION MEMBERSHIP HISTORY .....	9
DISTINGUISHED PROFESSIONAL DIVISION SERVICE AWARD RECIPIENTS .....	10
OUTSTANDING LOCAL CHAPTER ADVISER AWARD RECIPIENTS .....	11
2000-2009 LOCAL CHAPTER MEMBERSHIP REPORT.....	12
1990-1999 LOCAL CHAPTER MEMBERSHIP REPORT.....	14
FALL LEADERSHIP DEVELOPMENT CONFERENCE HISTORY .....	16
STATE LEADERSHIP CONFERENCE ATTENDANCE.....	19
THE NORTH CAROLINA STATE CHAPTER OF PHI BETA LAMBDA CHRONOLOGY OF STATE CHAPTER OFFICERS.....	20
THE NORTH CAROLINA STATE CHAPTER OF PHI BETA LAMBDA CHRONOLOGY OF STATE COMMITTEE MEMBERS .....	25
THE NORTH CAROLINA STATE CHAPTER OF PHI BETA LAMBDA CHRONOLOGY OF PROFESSIONAL DIVISION OFFICERS .....	28
NATIONAL FBLA-PBL PROFESSIONAL DIVISION OFFICERS .....	31
THE NORTH CAROLINA PHI BETA LAMBDA FOUNDATTION, INC., BOARD OF DIRECTORS— OFFICERS .....	32

**APPENDIX 02 –NCPBL MISCELLANEOUS FORMS**

**APPENDIX 02 PAGE**

MEMBERSHIP REPORTING FORM .....3  
2008-2009 CHAPTER MANAGEMENT TEAM .....4  
PROFESSIONAL DIVISION MEMBERSHIP FORM.....5  
CHAPTER CHALLENGE / FOOD LION SHOP ‘n SHARE .....6

**APPENDIX 03 –STATE AWARDS PROGRAM ENTRY FORMS**

APPENDIX 06 PAGE

COMPETITIVE EVENTS SUMMARY ..... 3  
    INDIVIDUAL EVENTS ..... 3  
    TEAM EVENTS..... 4  
    CHAPTER EVENTS ..... 4  
    SPECIAL INDIVIDUAL EVENTS ..... 4  
    RECOGNITION EVENTS..... 4  
EVENT ENTRY SUMMARY FORM..... 5  
SCHOOL-SITE TESTED EVENTS ..... 16  
PREJUDGED EVENT SUBMISSION FORMS ..... 20  
    2009 DESKTOP APPLICATION PROGRAMMING ..... 20  
    2009 DIGITAL VIDEO PRODUCTION ..... 22  
    2009 E-BUSINESS ..... 24  
    2009 INTERNET APPLICATION PROGRAMMING ..... 26  
    2009 WEB SITE DEVELOPMENT ..... 28  
ADDRESS LISTING OF EVENT PARTICIPANTS ..... 30  
NORTH CAROLINA BUSINESSPERSON OF THE YEAR ENTRY FORM ..... 33  
NORTH CAROLINA GOLD SEAL CHAPTER AWARD ENTRY FORM..... 34  
WHO’S WHO IN NORTH CAROLINA PHI BETA LAMBDA ENTRY FORM ..... 42  
LOCAL RECRUITMENT OF CHAPTERS ENTRY FORM..... 44  
THE NORTH CAROLINA PHI BETA LAMBDA FOUNDATION, INC., SCHOLARSHIP APPLICATION  
    FORM ..... 45  
DISTINGUISHED SERVICE AWARD NOMINATION FORM..... 48  
EVENT ENTRY SUBSTITUTION FORM..... 49