

The North Carolina State Chapter of

PHI BETA LAMBDA

State Handbook

Section 9 – STATE AND NATIONAL OFFICER CANDIDATE GUIDE

2008-2009

*A college-level national
association for the
professional development
of business students*

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State Handbook

Section 9 – STATE OFFICER CANDIDATE GUIDE

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The North Carolina State Chapter of Phi Beta Lambda

As you begin preparations for the 2009 annual State Leadership Conference, please keep in mind the possibility of running a candidate for a state officer position. This "Guide" will provide you with essential information and steps that you need to take to provide such an opportunity for one of your members who has shown excellent leadership potential.

The experience can be challenging and exciting, but it will not necessarily be easy. The challenge begins with your chapter's recognition of state officer talent in one of your members. The challenge continues as you apply the key elements of determination, commitment, preparation, and effort in developing and carrying out a successful election campaign during the State Leadership Conference. Once elected, the challenge continues even further as state officers seek to carry out the duties of their offices.

Members are not elected to state officer positions alone--nor do they fulfill the requirements of their positions alone. Rather, officers need the support and encouragement of many people, including:

Parents, school officials, and department heads who need to be informed and supportive of the state officer's effort. State officers must attend various conferences and meetings during the year and will probably miss some class time.

Local chapter advisers who approve and sign the nomination form serve as coaches and guides through the entire process. A state officer's local chapter adviser is also automatically a member of the State Executive Council when the officer is elected.

And, chapter officers and members who support the officer candidate's campaign and once elected, support the officer in his or her tasks throughout the year.

Serving as a state officer does require time, energy, and devotion to Phi Beta Lambda, but the benefits to be derived from such service are tremendous. The State Executive Council sincerely hopes that you will seriously consider nominating one of your deserving, dedicated members for a state officer. We look forward to excellent campaigning this year and, most of all, having a candidate for each elected office.

Important Forms for running for state office:

- STATE OFFICER NOMINATION INTENT FORM
- OFFICIAL NOMINATION FOR STATE OFFICE

Check calendar for appropriate dates for submitting these forms. Candidates with late or incomplete entries will not be eligible for nomination as a state officer.

**NORTH CAROLINA PHI BETA LAMBDA
ELECTED STATE OFFICER POSITIONS**

- State President**
- Eastern Region Vice President**
- Central Region Vice President**
- Western Region Vice President**
- State Secretary/Treasurer**
- State Historian**

QUALIFICATIONS FOR STATE OFFICE

(NCPBL State Bylaws, Article VII, Section 2)

- A. Only active members are eligible to hold state office.
- B. Only those applicants who are present at the State Leadership Conference and officially certified by the Officer Screening Committee shall be eligible.
- C. To be considered for a state office in Phi Beta Lambda, an applicant shall
 1. have at least one full school year remaining in his or her educational program,
 2. be approved by the local chapter and its adviser(s),
 3. submit an officer application form to the State Adviser(s) prior to the filing deadline.
 4. Candidates for Secretary/Treasurer must possess capability to record minutes of meetings in an accurate and timely manner as well as to produce them according to acceptable business standards. In addition, candidates for this office must have a working knowledge of financial record keeping and reporting.
 5. Candidates for the office of Historian must demonstrate web page knowledge by submitting a two- to three-page web design stating qualifications for the office.

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DUTIES OF ELECTED STATE OFFICERS

(adapted from NCPBL State Bylaws, Article VIII, Sections 1, 2, 3, 4)

PRESIDENT:

It shall be the duty of the President to preside over all Executive Council meetings at which time plans will be made for the State Leadership Conference, various state projects and activities, and other business as necessary to conduct the affairs of the Chapter. The President shall appoint all special committees as deemed necessary and shall serve as ex-officio member of these committees. The President shall promote chapter organization as well as chapter activities. It shall be the duty of the outgoing President to prepare the annual activities report for the state chapter.

REGIONAL VICE PRESIDENTS:

It is the duty of regional Vice Presidents, acting under the direction of the President, to oversee the welfare and promotion of the Phi Beta Lambda organization in their regions of the state and preside over regional meetings. Each Vice President shall promote chapter and membership growth as well as seek ways to incorporate business community support for their regions.

In case the office of the President becomes vacant, the Vice President from the President's region succeeds to the presidency and assumes the duties of the President.

SECRETARY/TREASURER:

It shall be the duty of the Secretary/Treasurer to perform the tasks common to such an office, such as keeping accurate records of the sessions of the State Leadership Conference and of the meetings of the Executive Council. The Secretary/Treasurer shall maintain the permanent files of all minutes. The Secretary/Treasurer shall work with the State Adviser as custodian of the funds of the Chapter.

HISTORIAN:

The Historian is responsible for publishing the state newsletter and maintaining the state chapter web site. The Historian collects information from each local chapter and checks for correctness of form and grammar. The Historian should have basic web development experience. The Historian will be responsible for composing content for the web page and ensuring that the web site is accurate and up to date.

PROCEDURES FOR FILING STATE OFFICER CANDIDATE NOMINATIONS

A local chapter may nominate one or two candidates for state office. The By-laws state, though, that if both candidates are contested and win, only the candidate for the higher office may serve. However, if one or both of the offices are unopposed, both candidates may be elected and serve. Whether elected or appointed, no more than two state officers may serve from an individual local chapter in the same time period.

Candidates must be approved by their local chapters and advisers, and they must meet qualifications as outlined in the State Officer Candidate Guide.

Nominations for state offices are not accepted from the floor at the State Leadership Conference. If there are no candidates for an office, the State Executive Council will appoint a qualified person.

Prior to SLC screening meeting, an officer candidate may submit a letter signed by himself and his adviser indicating he would like to change the position for which he wishes to campaign. Approval must be granted by a majority of the State Committee (state adviser and directors).

Outlined below are the procedures for filing the application for a state office. In addition to observing these guidelines, candidates should read carefully the information on state officers in the State Bylaws. Candidates should also note the campaign obligations listed in the tentative and official SLC programs.

1. The "STATE OFFICER NOMINATION INTENT FORM" in the documents section at the end of this Guide should be completed and **received by** the State Adviser's office no later than date listed on the NCPBL Calendar in Section 01 to indicate which office(s) your chapter will nominate a candidate(s).
2. After response forms are received, the State Adviser's office will notify all chapters of the number of candidates running for each office. In the event your chapter wishes, a candidate (or another candidate) may be nominated at that time using the Official Nomination For State Office form which must be sent to the State Adviser and **received by** the deadline listed on the NCPBL Calendar in Section 01.

3. The "OFFICIAL NOMINATION FOR STATE OFFICE" must be completed and **received** in the State Adviser's office no later than date listed on listed on the NCPBL Calendar in Section 01. Upon receipt of this form in the State Adviser's office, an acknowledgment will be sent to the candidate's local chapter adviser indicating official receipt. A copy of this form (which may be duplicated) is included in this section.

The following items must accompany the "Certificate of Nomination for State Office":

- A. A transcript of college coursework completed (student-issued copy acceptable) as well as a listing of courses for which candidate is currently enrolled.
- B. A written statement prepared by the candidate setting forth his or her qualifications for the office and his or her plans for the next school year.
- C. A letter of recommendation from the candidate's local chapter adviser.
- D. A signed copy of the NCPBL Code of Conduct (copy at the end of this section).
- E. For Historian candidates, a diskette, CD, or URL address of a two-to-three page web design by the candidate (to ensure ability to maintain the state website.)

ELECTION RULES, REGULATIONS, AND PROCEDURES

As a candidate for state office, you should be familiar with a number of items prior to the Conference in order to have a successful campaign and election. Please take special note of your responsibilities as a candidate as well as of the rules, regulations, and procedures for the election.

RULES AND REGULATIONS:

1. There shall be no campaigning in verbal, written, or electronic form outside of the candidate's local chapter prior to the screening meeting at the State Leadership Conference. Campaigning may begin immediately following the screening interviews. Candidates and advisers should make sure chapter members understand this regulation.
2. The candidates for state office will be interviewed by the candidate screening committee (consisting of State Committee and current state officers not running for office.) The candidate must be accompanied to this meeting by his or her campaign manager and

chapter adviser. Failure of any of these individuals to be present without previous approval will result in disqualification of the candidate.

3. Prior to the officer screening process, candidates may request to change the office for which they will campaign, a majority of the State Committee (state adviser and directors) must approve the change.
4. The screening process. Candidates must bring to the screening meeting samples of ALL campaign materials that will be used, including brochures and give-away items (such as candy, pencils, etc.). With the exception of items like candy, items to be distributed must have candidate identification. During the screening process, the screening committee will evaluate for appropriateness and safety all materials and the candidate and campaign manager speeches. Nominees and their manager will deliver a practice run of their nomination and campaign speeches before the committee.
5. Each candidate will be assigned a campaign booth area (usually a six-foot table with two chairs.) Campaign materials can be distributed only from the booth, with these exceptions: campaign material may be placed in chairs during general and regional sessions prior to the voting session, campaign buttons (or similar sized badges) may be worn by delegates, and materials may be offered to delegates at the door for general sessions. Items left in the meeting rooms must be removed following the sessions. The candidate is responsible for the security of items at the booth. Candidates will be notified of the time the booths should be dismantled, usually immediately after the voting session. No literature, posters, etc., may be affixed to walls.
6. Organized campaigning that might disturb hotel guests must be completed by 11:30 p.m.
7. Campaigning is to be done by emphasizing the positive attributes of the candidate, not by being negative about other candidates.
8. Questions or concerns about inappropriate campaigning may be brought to the attention of the State Adviser, who will, if necessary, reconvene the candidate screening committee. The committee may insist in a change in the campaign activity or revoke its decision to approve the candidate if the situation continues or is serious enough.

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PROCEDURES:

1. Candidates for President, Secretary/Treasurer, and Historian will present their nomination/campaign speeches during a General Session; candidates for Regional Vice President will present their speeches during the Regional Meetings (which follow a General Session). Candidates for Historian, Secretary/Treasurer, and Regional Vice Presidents will have three minutes total time to share between the candidate and campaign manager. Candidates for President will have five minutes total time.
2. Elections will be conducted during the Business/Voting session and will be by secret ballot of the verified voting delegates.

ADVISER INFORMATION

The adviser works closely with State Committee members and is kept fully informed of all aspects of the officer's work. Even though it can be difficult for an adviser to play the dual role of adviser and educator, the relationship between the two is critical to local and state chapter success. The officer may not always be receptive to advice, and a special effort should be made by advisers to overcome this delicate situation. The officer must realize that the local adviser's signature on the application shows his or her support for the officer and the state organization. The adviser assists the officer in accepting these responsibilities:

1. ACQUIRE BASIC KNOWLEDGE of the organization and be capable of discussing ideas and issues intelligently.
2. PORTRAY THE PROPER IMAGE when representing the organization. Wear appropriate business attire for all meetings, dress in appropriate evening attire as necessary, use correct grammar, display proper manners and etiquette, exhibit a good attitude, be a good listener, and use public relation skills in working with individual members and chapters.
3. PREPARE APPROPRIATE SPEECHES when asked to visit local chapters, participate in conferences, and speak to business and civic groups. Local advisers should review speech materials, outlines, etc., and the officer should practice the speech before an appearance.
4. ANSWER CORRESPONDENCE and send "thank you" letters promptly. The local adviser should proofread all correspondence before it is sent. The officer should write correspondence and articles and present them to the adviser for suggestions and any necessary changes.

As the local adviser for a state officer, you accept responsibility for assisting your state officer. Secure the endorsement and support of the officer's family, school officials, and employers, if applicable. Be prepared to devote office space and personal time to your state officer. Helping your officer get organized is important. He or she must learn to budget time and keep materials readily available. .

Be informed about state and national programs, priorities, and critical issues so ideas and counsel may be given to your officer. Don't expect the officer to understand issues and have all of the background information that you might have. Take an active part in helping your officer reach his or her personal and organizational goals. Having a state officer is a growth experience for you, the adviser, also, since everyone benefits from the experiences and opportunities that NCPBL provides.

Be prepared to accompany your officer to State Executive Council meetings (which are listed on the following page) since you are also a full member of the State Executive Council. Review the goals for the state organization; these goals reflect the plan of work for the state chapter. Each officer has specific responsibilities, and, the state officer's adviser, should contribute to accomplishment of these goals.

IF YOU ARE ELECTED!!!

Elected officers become members of the NCPBL State Executive Council, the group-responsible for implementing the policies and programs of the state association. Serving as an officer is a very rewarding experience, but it also carries with it responsibilities. Your role and that of the other members of the State Executive Council will be to work within the policies and programs of work that are already in place as well as to seek measures of improvement.

You should be aware of each of the following meetings that you and your adviser are expected to attend:

- State Leadership Conference Executive Council Meeting (usually after the Awards Program)
- Spring Executive Council Meeting & Officer Orientation (late May/early June; Friday-Saturday)
- Fall Executive Council Meeting (usually late August; Friday-Saturday)

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Fall Leadership Development Conference (late October/ early November; Friday-Saturday)
Winter Executive Council Meeting (late January/early February; Friday-Saturday)
State Leadership Conference (late March/early April; Wednesday through Saturday)

- * Institute for Leaders (prior to NLC)
- * National Leadership Conference
- * National Fall Leadership Conference
(* encouraged but not required attendance)

The State Chapter does provide lodging and transportation expenses for Executive Council meetings. Unfortunately, however, resources do not cover meal costs for Executive Council meetings or for state officer expenses for conferences. The SLC budget usually includes room coverage but not registration. Thus, it is important for your local chapter to realize that it may be necessary to assist you during the year. See the following "Travel and Expense Policies" for details. Additionally, the State Chapter does not provide health insurance coverage for Executive Council members.

The North Carolina State Chapter of Phi Beta Lambda Travel & Expense Policies

These policies provide guidelines for the reimbursement of travel and expenses for Executive Council members. The Executive Council includes state officers, State Committee members, the adviser of a state officer, and Professional Division officers. Only one adviser or director per state officer is eligible for reimbursement. All expenses to be reimbursed shall be submitted within two weeks of the meeting, workshop, or conference.

TRANSPORTATION

Actual round-trip mileage driven by an Executive Council member will be paid as follows:

100 - 200 miles	\$20.00
201 - 275 miles	\$25.00
276 - 325 miles	\$30.00
326 - 400 miles	\$35.00
401 - 475 miles	\$40.00
476 - 550 miles	\$45.00
551 - 625 miles	\$50.00
626 - 700 miles	\$55.00
701 - 800 miles	\$60.00
800+ miles	\$65.00

When the school provides a vehicle, no mileage will be reimbursed. Executive Council members are encouraged to carpool whenever possible. When a school vehicle is used at a higher cost than that covered by the scale above, the State Chapter will pay up to \$5.00 per additional passenger. No more than two individuals from a local chapter may seek reimbursement.

MEALS

Generally, no meals will be furnished. On occasion, a meal may be provided as deemed by the State Committee. Information of any meals provided will be stated in the meeting notice sent to all Executive Council members.

LODGING

Lodging will be paid for double (triple or quad) occupancy at the designated hotel. One-half of the double occupancy rates will be covered by the State Chapter if a member chooses single occupancy (the individual will thus bear the difference). If a member is given a single, since no roommate was available, the State Chapter will cover the expense of the single room. If the school/employer will cover lodging expenses for an Executive Council member, no lodging will be reimbursed and that person(s) is responsible for paying for the room(s) upon checkout. If a member chooses to stay in a different hotel, he or she is responsible for his or her own room reservation and no reimbursement will be made.

OFFICER TRAVEL

Usually the state budget includes an allocation for state officers to use for covering appropriate expenses associated with attending the Institute for Leaders and a National Fall Leadership Conference. The travel allocation will be approved yearly. Advances may be given but must be later documented by receipts. Officers (or their chapters) receiving advances or prepayments and then not attending conference will be responsible for reimbursing the State Chapter.

Funds are earmarked in the budget for state officer travel expenses specifically for the purpose of visiting active/inactive/potential local chapters in the region/state and attending FBLA District Meetings. **Prior approval from the State Adviser is required for use of these funds.** A reimbursement form must be submitted to the State Adviser before the travel is completed to ensure that funds are

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available. Reimbursement for officer travel for the purposes mentioned above is basically limited to transportation; local chapters visited should provide lodging if required. If an officer's chapter or school provides funds to cover these expenses, then the officer should not seek reimbursement from the state chapter.

CONFERENCES

Travel costs and expenses are generally not provided for Executive Council members attending conferences during the year. The State Leadership Conference budget does, however, provide for coverage of lodging (room and tax) at the conference facility and meals as provided for by the State Chapter (planned functions) for members of the State Executive Council provided that they attend at least two State Executive Council meetings during the year. State Leadership Conference registration fees are not included in the State Leadership Conference budget for any Executive Council members. ("Lodging" guidelines above also apply to the State Leadership Conference lodging in

regards to hotel accommodations, rooming, and reimbursement.)

MISCELLANEOUS

Postage, printing, and telephone expenses in connection with Executive Council-related matters will be reimbursed. Internet Service Provider accounts will not be a reimbursable expense. Receipts must be attached to the reimbursement form.

REPORTING EXPENSES

Executive Council members shall report their expenses on the official "Request for Payment or Reimbursement" form. Receipts must be attached for miscellaneous expenses. Completed forms must be returned to the State Adviser for approval and payment within two weeks of the incurred expense.

(APPROVED: January 21, 1984; September 6, 1986; September 19, 1992; June 8, 2002; September 13, 2003, June 2008)

PROCEDURES FOR FILING NATIONAL OFFICER CANDIDATE NOMINATIONS

Since candidates for national PBL offices represent the state, NCPBL uses the following guidelines for nomination:

1. The candidate must be endorsed by the State Executive Committee. Members wishing to be endorsed must submit to the State Adviser a letter of interest including qualifications, platform and campaign basics, and education plans for the next year; a transcript; and a letter of recommendation from their chapter adviser. The receipt date for this letter of recommendation and materials is included on the NCPBL Calendar list of dates in Section 01 of this handbook.

2. As representatives of the state, members wishing State Council endorsement are also to sign the Code of Conduct form that is used for state officer nomination. This form is included in of this section of the handbook.
3. The State Council will review completed applications and make decisions on endorsing a candidate and making the official national officer nomination.
4. As the state nominee, the State Council will assist in the candidate's campaign. The candidate is expected to keep the State Council, particularly the State Adviser, informed of matters related to the campaign.

NORTH CAROLINA PHI BETA LAMBDA

REQUEST FOR PAYMENT OR REIMBURSEMENT

DESCRIPTION OF REQUEST: Send to: Mr. Dan Hazlett
Stanly Community College
141 College Drive
Albemarle, NC 28001

DATE EXPENSE INCURRED: _____

EXPENSE DISTRIBUTION:
(Receipts required for all payments other than approved mileage)

Office Operations	\$	_____
Mileage (_____ miles) (per Travel & Expense Policies)	\$	_____
Executive Council Meetings	\$	_____
Newsletter	\$	_____
SLC:	\$	_____
	\$	_____
	\$	_____
FLDC:	\$	_____
	\$	_____
Other (Describe):	\$	_____

TOTAL \$ _____

SIGNATURE OF ORIGINATOR: _____

TITLE OF ORIGINATOR: _____

DATE SUBMITTED: _____

MAKE CHECK PAYABLE TO: _____

APPROVALS FOR PAYMENT: (FOR OFFICE USE BELOW)

STATE ADVISER AUTHORIZATION: _____

STATE SECRETARY/TREASURER AUTHORIZATION: _____

DATE: _____

DATE: _____

DATE PAYMENT MADE: _____

CHECK NUMBER: _____

BUDGET LINE(S) CHARGED: _____

AMOUNT: _____

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**NORTH CAROLINA PHI BETA LAMBDA
STATE LEADERSHIP CONFERENCE**

STATE OFFICER NOMINATION INTENT FORM

(SCHOOL NAME)	
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Intends to nominate the following candidate(s) for state office(s):

<input type="checkbox"/>	President	NAME:	_____
		ADDRESS:	_____
		TELEPHONE	_____
		EMAIL	_____

<input type="checkbox"/>	Eastern Region Vice President	NAME:	_____
		ADDRESS:	_____
		TELEPHONE	_____
		EMAIL	_____

<input type="checkbox"/>	Central Region Vice President	NAME:	_____
		ADDRESS:	_____
		TELEPHONE	_____
		EMAIL	_____

<input type="checkbox"/>	Western Region Vice President	NAME:	_____
		ADDRESS:	_____
		TELEPHONE	_____
		EMAIL	_____

<input type="checkbox"/>	Secretary / Treasurer	NAME:	_____
		ADDRESS:	_____
		TELEPHONE	_____
		EMAIL	_____

<input type="checkbox"/>	Historian	NAME:	_____
		ADDRESS:	_____
		TELEPHONE	_____
		EMAIL	_____

Adviser's Signature _____

Date: _____

Return by date shown on NCPBL Calendar (Section 01) to:

Mr. Dan Hazlett, NCPBL State Adviser
Stanly Community College
141 College Drive
Albemarle, NC 28001

NORTH CAROLINA PHI BETA LAMBDA

OFFICIAL NOMINATION FOR STATE OFFICE

CANDIDATE _____

SCHOOL _____

SCHOOL ADDRESS _____

HOME ADDRESS _____

E-MAIL ADDRESS _____

TELEPHONES

HOME: _____

SCHOOL: _____

OFFICE FOR WHICH NOMINATION IS BEING MADE:

PRESIDENT

EASTERN REGION VICE PRESIDENT

SECRETARY/TREASURER

CENTRAL REGION VICE PRESIDENT

HISTORIAN

WESTERN REGION VICE PRESIDENT

Yes

URL of sample Website or media with files is included with nomination materials

QUALIFICATIONS OF CANDIDATE:

Phi Beta Lambda Offices Held: _____

Offices Held in Other School _____

Organizations: _____

Offices Held in Community _____

Organizations: _____

Present Class (check one):

Freshman

Sophomore

Junior

Senior

Cumulative Grade Point Average: _____

on a _____ scale

Current Employment: _____

Other/Prior Work Experience: _____

We certify that the candidate nominated meets the requirements for candidates as set forth in the North Carolina Phi Beta Lambda State Bylaws. All documents required in the "State Officer Candidate Guide" are attached to this form.

(SIGNED)

Chapter President

Chapter Adviser

NORTH CAROLINA PHI BETA LAMBDA
STATE / NATIONAL OFFICER CODE OF CONDUCT

1. State officers shall behave in a courteous and respectful manner, refraining from language and actions that might bring discredit upon the state and national associations.
2. State officers shall participate fully in all appropriate activities, conferences, workshops, business meetings, etc., for which they have responsibility.
3. State officers shall wear appropriate business attire when attending conferences, workshops, business meetings, etc., for which they have responsibility.
4. State officers shall be willing to take and follow instructions as directed by those responsible for them.
5. State officers shall avoid places and actions that in any way could raise questions as to moral character or conduct.
6. State officers shall treat all members equally.
7. State officers participating in state association assignments shall not damage or deface property. The officer causing such damage will pay for damages to any property or furnishings in hotel rooms, private accommodations and/or buildings individually.
8. State officers shall communicate any circumstances that prevent carrying out predetermined plans at assigned conferences to appropriate conference personnel.
9. State officers are not permitted to wear any campaign materials at the State Leadership Conference, nor are they allowed to campaign for a candidate or serve as a campaign manager, except when campaigning for oneself.
10. State officers shall not violate any state or federal laws.
11. State officers must maintain school enrollment during the fall through spring terms by carrying a minimum of six credit hours each term. Officers who fail to comply must relinquish their duties.
12. State officers must maintain at least a 2.0 grade point average during their terms of office. Officers who fail to comply must relinquish their duties.

State officers who violate or ignore any of the above subject themselves to being removed from the PBL conference and/or activity and sent home at their own expense by their local/state chapter adviser in consultation, when appropriate, with members of the NCPBL State Committee. State officers also become subject to having any honors or offices withdrawn.

CERTIFICATION OF ACCEPTANCE:

As a state officer, I agree that I will abide by the above prescribed Code of Conduct.

Signature

Date

Approved by the North Carolina Phi Beta Lambda State Committee, January 10, 1992.