



**PHI BETA LAMBDA**

**UC SAN DIEGO EST. 2005**

## **PHI BETA LAMBDA at UC SAN DIEGO CONSTITUTION**

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### **Article I. Name of Student Organization**

The name of this division of FBLA-PBL, Inc. shall be "Phi Beta Lambda at UC San Diego" and may be referred to as "PBL." This organization is a chapter of collegiate FBLA. The name of the organization shall be "Phi Beta Lambda (FBLA)."

### **Article II. Statement of Purpose**

#### **Section 1. Purpose**

PBL is a not-for-profit organization with the purpose of providing opportunities for undergraduate students to develop business-related career competencies.

#### **Section 2. Goals**

The specific goals of PBL are to:

- Develop strong professional and leadership skills.
- Build self-confidence and pride in one's work.
- Foster understanding of various industries and career paths.
- Encourage personal projects that contribute to professional growth and community improvement.
- Cultivate strong character and prepare for active citizenship.
- Promote financial literacy and effective resource management.
- Emphasize the importance of continuous learning and personal development.
- Guide individuals in setting and achieving career goals.
- Facilitate the transition from education to professional life.
- Enhance communication and collaboration skills in diverse work environments.



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### Article III. Nonprofit Statement

#### Section 1.

Phi Beta Lambda at UC San Diego is a non-profit student organization.

### Article IV. Requirements for Membership

#### Section 1. Chapter Membership

PBL membership shall consist of members of chartered local chapters. These members shall hold membership in their state and national chapters. Individual members shall be recognized only through a state chapter of PBL except that, in the case where there is no state chapter, the member shall be recognized by the national office. Membership is open to all enrolled UCSD undergraduate students.

#### Section 2. National Membership

National PBL, as well as the state and local chapters, shall be open for membership to these classes of members:

- Active members shall be students enrolled at UCSD who accept the purpose of PBL and subscribe to its creed. Active members shall pay dues as established by PBL and may participate in national events, in accordance with the guidelines of the National Awards Program; serve as voting delegates to the National Leadership Conference; hold national office, in accordance with Article VI; and otherwise represent their state and local chapters as approved by their respective state or local advisers.
- Honorary life members may be elected to a state or local chapter by majority vote. They shall be persons who are assisting in the advancement of business and office education and/or who are rendering outstanding service to PBL. Honorary life members shall not vote or hold office and shall not be required to pay dues.
- National honorary members may be recommended by the membership and shall be accepted upon approval by the board of directors of FBLA-PBL, Inc. They shall be persons making significant contributions to the field of business and office education and/or to the growth and development of FBLA-PBL, Inc. National honorary life members shall not vote or hold office and shall not be required to pay dues.



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### Section 3. Membership Guidelines

All members are required to abide by the following guidelines:

- Attend all chapter meetings and GBMs as denoted by the officer team. Members will be allowed a select number of quarterly absences as determined by the sitting officer team's policies, as long as appropriate advanced notice is given.
- Attend all recruitment events unless submitting an absence form or otherwise providing appropriate advanced notice.
- Maintain a professional viewpoint, be open to learning, and abide by the code of conduct for the University of California, San Diego's Student Code of Conduct.
- Pay dues quarterly or annually as denoted within Article IV - Section 2.

### Section 4. Reprimands

In the case that any of the above guidelines are not followed the members will be subject to the following reprimands:

- Upon breaking the Student Code of Conduct, will be subject to a review panel as denoted by the presiding Officer Board and will need to receive a  $\frac{2}{3}$  vote in order to continue membership.
- Upon receiving four absences will be given a warning regarding probation of membership, upon five absences will be required to attend an officer meeting and will need a  $\frac{2}{3}$  vote of the presiding Officer Board in order to continue membership.

### Section 5. National Dues

National dues based on fiscal reports by the national office, and on recommendations by the national executive council and the board of directors, shall be determined by a majority vote of the local voting delegates at the National Leadership Conference. National dues of members shall be forwarded directly to the PBL national office or shall be submitted through state chapters at the discretion of the state chapter. Chapter Dues will be determined by the officer board via this constitution and can only be changed on a  $\frac{2}{3}$  majority vote of the elected officer board.



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## Section 6. Chapter Membership Dues

Quarterly dues (if chosen to pay quarterly) shall be:

- Returning Members: \$70
- Mentors: \$60
- New Members: \$120

## Section 7. Financial Business Report

An annual financial business report will be prepared and published by the VP of Finance as well as Quarterly Reviews that will be made in accordance with the executive board's review.

## Section 8. Fiscal Year

The fiscal year of Phi Beta Lambda at UC San Diego shall be July 1 through June 30.

## Section 9. Payment Plan

Members unable to pay dues will have the option of setting up an installment payment plan. If members are still unable to pay, membership will be temporarily suspended for the remainder of the quarter.

# Article V. Frequency of Organization Meetings

## Section 1. Meeting Frequency

PBL will meet at least eight times a quarter to discuss projects and other matters. Refer to Article IV, Section 3 for meeting attendance guidelines.



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### Article VI. Qualifications for Holding Office and Methods of Selecting and Replacing Officers

#### Section 1. Election of Officers

Only registered UC San Diego students may hold office in the organization. Only registered UC San Diego students may vote in elections for the selection of the organization's officers. Officers strictly for the PBL's executive board will be elected through the following process. The selection period will be held in the beginning of spring quarter.

- To be considered for election, a potential candidate must fill out a written application compiled by the current President and Executive Vice President. The application will be reviewed by PBL's Executive Board. From those applicants, no more than two candidates shall be selected to continue on with the process.
- If selected out of the written application process, candidates must participate in an interview conducted by the PBL's Executive Board. The interview will consist of a speech with the candidate's vision for the future of PBL and their plan for their term, followed by questions asked by the executive board.
- Immediately following the interviews, a physical vote will be conducted. Each member from the executive board (with exception of the President) will have one vote. No member will be allowed to abstain from voting. Individuals running for the same position as that which is being voted upon will not be eligible to vote, nor will be permitted in the room in which the voting is conducted. In the event that there is a tie, the President will serve as the tiebreaker.

#### Section 2. General Expectations & Responsibilities

All officers are expected to:

- Attend all officer, general, and other events held by Phi Beta Lambda at UC San Diego. Officers will have 3 absences (2 excused and 1 unexcused) from GBM's, Chapter Meetings, or Officer Meetings per quarter
- Submit an absence form in case of their absence and, in the case it is less than 24 hours until said event, officers will contact the Executive Vice President or President to notify them
- Serve out the full duration of their term. In the case officers DO NOT serve their whole term, they will not be allowed to run for a position for the following year

Revised August 2024



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- Use and engage in all communication platforms with general members and fellow officers
- Update and track progress on various tasks, projects, and initiatives within the task management platform
- Maintain professional demeanor and decision-making process at all times
- Attend all recruitment events unless excused by the Executive Vice President and President
- Prepare a guide for their successor two weeks prior to elections occurring

### Section 3. Term of Office

Officers shall be elected for one year or until their successors are elected or appointed.

### Section 4. Vacancy in Office

A vacancy in any office shall be filled by appointment by the president with the approval of the executive officer team.

### Section 5. Officer Meetings

Meetings will be held on a biweekly basis at a minimum. Every meeting will have notes taken by the VP of Internal Affairs.

### Section 6. President

**PRESIDENT:** Face of the organization at every level, leader of both member body and officer team. Business Council Board of Directors representative.

- Represent PBL at UC San Diego as a whole
- Oversee Officer Team and projects
- Conduct and facilitate officer meetings
- Speak in front of general body at GBM
- Appoint and delegate tasks
- Motivate and maintain officer team and members
- Member of Board of Directors on Business Council



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### Section 7. Executive Vice President

**EXECUTIVE VICE PRESIDENT:** Right-hand to the President. Holds all officers responsible for the completion of tasks by maintaining an efficient and effective officer team. Business Council Senator 1.

- Managing the officer team
- Helping the President with GBM's
- In charge of expectations and responsibilities
- Management tool
- Recruitment
- Helping run Mentorship program

### Section 8. Vice Presidents

**A) VICE PRESIDENT of MARKETING:** Responsible for maintaining the outward face of Phi Beta Lambda at UC San Diego, including both its web and materials presences. Responsible for creating and managing recruitment programs, but not management of events themselves.

- Maintaining the face of PBL (Creating facebook event pages, posters, flyers etc...)
- Ensuring that other members participate in marketing (Tabling, flyering, social media sharing)
- Attending all officer meetings
- Overseeing the tasks done by the Director of PR, ensuring social media content is regularly updated.

**B) VICE PRESIDENT of FINANCE:** Responsible for maintaining the budget and swift payment of the organization's expenses. Ensures internal control over organization funds and raising of additional funds when applicable. Responsible for understanding relevant university policies.

- AS funding: read the handbook [finance.ucsd.edu](http://finance.ucsd.edu) (submit form for AS funding and see everybody's request for funding).
- 6 weeks in advance go with business day.
- Be proactive about turning as funding for recruitment
- Each application goes to a certain person Ana Dickson- in charge of prof orgs



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- Triton activity planner form due 21 days in advance
- Build relationships with people like Ana and constantly keep in contact with her
- Use estimates and invoices keep records of everything
- List of sources of funding
- UCSD Community Fund
- UCSD Competition Fund

**C) VICE PRESIDENT of EXTERNAL AFFAIRS:** Responsible for creating and completing events that present the organization outward, including those that collaborate with other organizations, those that face the business community, and those that face the general public. Responsible for completing recruitment events and logistics, but not creation of programs themselves. Responsible for understanding relevant university policies.

**D) VICE PRESIDENT of INTERNAL AFFAIRS:** Responsible for creating and completing events that serve the organization and its membership base. Responsible for maintaining operational continuation of the organization. Responsible for understanding relevant university policies.

### Section 9. Directors

**A) DIRECTOR of PUBLIC RELATIONS:** Maintains digital presence of the organization, as well as the relevant social media content for specific events. Assists the Vice President of Marketing in creation of materials and any other responsibilities as necessary. MARKETING tree.

**B) DIRECTOR of SPONSORSHIP:** Responsible for the creation and completion of fundraisers. Responsible for market updates, if necessary. Assists the Vice President of Finance in responsibilities not pertaining to internal controls of budgets, if necessary. FINANCE tree.

- Keep the members of PBL updated on the financial markets.
- Updates are to be given either through GBM or through the Facebook page.
- Required to generate and plan out fundraising ideas.

**C) DIRECTOR of MEMBERSHIP DEVELOPMENT:** Responsible for creation and management of member introduction program. Manages the database of membership and all logistics related to it, including Facebook group invites and state membership card distribution. Assists the Vice





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President of Operations and the Director of Programming in completing the year-ending banquet. OPERATIONS tree.

- Creating the member induction program
- Keeping Facebook up to date with new members
- Making chat channels for the new classes
- Workshops for the new class (and potentially all of PBL as well)
- Distributing state membership cards
- Planning new class initiation
- Work with VP Finance to ensure the new class pays their dues

**D) DIRECTOR of OPERATIONS:** Responsible for ideation, creation, and completion of social and community service events, including year-ending banquet.. Works closely with the Vice President of Operations on the logistical completion of planned events. OPERATIONS tree.

- Booking rooms for GBMs
- Planning socials and clean up
- Making google sign in forms and organizing necessary carpools
- Planning end of the year banquet

**E) DIRECTOR of ALUMNI RELATIONS:** Responsible for maintaining a database and a relationship with former members of Phi Beta Lambda at UC San Diego. A one-time project lead for 2018-2019 as much as a long-term executive role for the future, must tackle this holistically as something to be created and then continue its management, setting a standard for how it will be maintained by future teams. EXTERNAL AFFAIRS tree.

- Maintain the weekly newsletters for alumni
- Quarterly reports sent to alumni regarding what is going on
- Invite alumni to specific events designated by the board
- Host one alumni focused event per year
- Manage database of alumni
- Put together Senior Send-Off Night every Spring Quarter



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## Section 10. Niche Positions

Task-based roles that can be filled by a member if enough applicants exist, not necessary for continued operation of the organization and not participant in officer meetings on the level of a director or above.

## Article VII. Risk Management

### Section 1.

Phi Beta Lambda at UC San Diego is a registered student organization at University of California, San Diego, but not part of the University itself. Phi Beta Lambda at UC San Diego understands that the University does not assume legal liability for the actions of the organization.

## Article VIII. Emblems and Colors

### Section 1.

The official emblem and insignia item designs are described and protected from infringement by registration in the U.S. Patent Office under the Trademark Act of 1946. The manufacture, reproduction, wearing, or display of the emblem shall be governed by the board of directors.

### Section 2.

PBL emblems and insignia shall be uniform in all local and state chapters and within special emphasis groups. Only members in good standing may use official emblems and insignia.

### Section 3.

The official colors of PBL shall be blue and gold.

## Article IX. Parliamentary Authority



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The rules contained in the latest edition of Robert's Rules of Order Newly Revised shall govern PBL in all applicable cases and when they are not inconsistent with the rules and bylaws of FBLA-PBL, Inc.

## **Article X. Rules of Amendment**

### **Section 1.**

Proposed amendments will be submitted to the executive team from a current member of the PBL chapter. Upon receipt of such amendments the team will then elect to vote in said amendments by a  $\frac{2}{3}$  vote of all officers.

### **Section 2.**

The president and executive vice president of PBL shall be authorized to revise these bylaws to correct punctuation, grammar, cross references, article and section designations, and to make such other technical changes as may be necessary, where these changes shall be minor in detail and shall not alter the meaning or intent of the bylaws. Notice of changes made under this authority shall be communicated in writing to the executive officer team.

Last Amendment:

September 1, 2022

## **Article XI. Organization**

### **Section 1.**

PBL shall be an association of state and local chapters, each operating in accordance with a charter granted by FBLA-PBL, Inc. Only chapters that have received charters, Greek names, numbers issued by FBLA-PBL, Inc. and that are currently in good standing shall be referred to as "Phi Beta Lambda" or "PBL."



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### Section 2.

The board of directors of FBLA-PBL, Inc. shall serve as the policymaking body of this organization and derives its authority from the Articles of Incorporation of FBLA-PBL, Inc. and the laws of the District of Columbia. It may be referred to as the board of directors. Members of the board of directors shall be nominated by state chairmen and elected by the local FBLA-PBL chapters of their respective regions for three-year terms in accordance with the nominating and voting procedures determined by the board of directors.

### Section 3 .

The administration of PBL shall be vested in the association president and chief executive officer of FBLA-PBL, Inc.

### Section 4.

There shall be five administrative regions. The Eastern Region consists of Connecticut, Delaware, District of Columbia, DODDSEUR (Europe), Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Puerto Rico, Rhode Island, Vermont, and Virgin Islands. The Southern Region consists of Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, and West Virginia. The North Central Region consists of Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, Ohio, and Wisconsin. The Mountain-Plains Region consists of Colorado, Kansas, Nebraska, New Mexico, North Dakota, Oklahoma, South Dakota, Texas, and Wyoming. The Western Region consists of Alaska, Arizona, California, Canal Zone, Guam, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, and Washington.

### Section 5.

Each local chapter shall have an adviser who is either a faculty member teaching a business and/or business-related class or school staff member. A local chapter may have as many special- emphasis groups under the chapter charter as it deems necessary. The candidate receiving the lowest number of votes shall be dropped from each subsequent ballot until one candidate receives a majority of votes.



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## Article XII. Banking Privileges

### Section 1. Purpose

The purpose of establishing banking privileges is to facilitate deposits and withdrawals of funds, and to create a legal environment for collecting membership dues. This article governs the opening and management of a savings account for Phi Beta Lambda (FBLA) at UC San Diego.

### Section 2. Account Management

The Vice President of Finance shall have primary responsibility for managing the organization's finances and bank account, with oversight from the President.

### Section 3. Transactions

- a) Transactions shall proceed only with the acknowledgment of both the Vice President of Finance and the President.
- b) Only the President and Vice President of Finance are authorized to make transactions on behalf of the organization.
- c) After every transaction, the Vice President of Finance shall record the details to ensure fairness and transparency in funding and future transactions.

### Section 4. Signatories

- a) The authorized signatories for the organization's bank account shall be:
  - 1. President
  - 2. Executive Vice President
  - 3. Vice President of Finance
- b) At least two signatures from the authorized signatories shall be required for any changes to the bank account or for transactions exceeding an amount determined by the executive officer team.



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## Section 5. Transition of Authority

- a) In the event of a change in leadership, the outgoing officers shall facilitate the transition of banking privileges to the incoming officers within 30 days of the new officers taking their positions.
- b) The incoming and outgoing Presidents and Vice Presidents of Finance shall meet with the bank to update the account signatories.

## Section 6. Reporting

The Vice President of Finance shall provide monthly financial reports to the executive officer team and quarterly reports to the general membership, detailing the organization's financial status, including all income and expenditures.

## Section 7. Oversight

The executive officer team shall review the financial practices and reports of the organization at least once per quarter to ensure compliance with this article and sound financial management.