October 13, 2010

Dear Members:

History was achieved during the 39th Biennial National Convention in Chicago, Illinois with the adoption of the first-ever Policies and Procedures Manual. Our membership issued a clear mandate to codify the implementation of governance under one document that was clear, concise and user friendly. The Policies and Procedures Manual was masterfully produced by former National Corresponding Secretary Denise Eaton-May, Chairman Ann Pope and the members of the Policies and Procedures Committee. We owe a great debt of gratitude to them for their hard work and dedication to seeing this charge come to fruition.

The effective date of the Policies and Procedures Manual was August 1, 2010. The manual and the referenced documents via appendix, contemplate all rules, guidelines and instructions on how to implement Jack and Jill governance. Any omission of information from the Policies and Procedures Manual does not necessarily render its validity or enforcement void.

We encourage every member of Jack and Jill of America, Incorporated to give the Policies and Procedures Manual your thoughtful review.

Sincerely,

Jacqueline Nash
National Corresponding Secretary
NATIONAL OFFICERS

Jacqueline Moore Bowles  
President  
Mid-Western Region

Gail Johnson  
Vice President  
Eastern Region

Tara Joseph Labrie  
Program Director  
Central Region

Kimberley Henderson  
Recording Secretary  
South Central Region

Denise Eaton May  
Corresponding Secretary  
Far West Region

Mavis Parkman James  
Treasurer  
Southeastern Region

Sharon Johnson  
Editor  
Mid-Atlantic Region

REGIONAL DIRECTORS

Crystal Johnson Turner  
Central Region

Tammy King  
Eastern Region

Brenda Lacy-Davis  
Far West Region

Pamela Bennett Askew  
Mid-Atlantic Region

Kimberley Will  
Mid-Western Region

Lesa Rice-Jackson  
South Central Region

Joli Cooper  
Southeastern Region
# Jack and Jill of America, Inc. – Policies and Procedures

## Introduction/Preamble

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The Jack and Jill of America, Inc. Policies and Procedures Manual is one of a series of governing documents created to provide operational guidance to members and chapters. The purpose of the manual is to give notice and describe Jack and Jill of America, Inc. operational policies and the procedures of this organization. This manual complements the National Constitution and Bylaws, and will be used in conjunction with all other existing governing documents and is intended to be a living document.

Committee Members

Ann E. Pope, Chair – Southeastern Region
Tahnda Bailey – Far West Region
Kathy Poston – Mid-Western Region
Pearl Givens – Mid-Atlantic Region
Stephanie Gilbert – Eastern Region
Thomasina Johnson, National Parliamentarian
Denise Eaton May, National Corresponding Secretary
Section 1 – Governance
I. PURPOSE

The purpose of this policy is to outline how the Policies and Procedures Manual will be updated.

II. POLICY

The Policies and Procedures Manual is designed to complement The National Constitution and Bylaws and other governing documents of Jack and Jill of America, Inc. The Manual shall be reviewed as needed by the National Executive Board (NEB) for modification and amending. All modifications and amendments shall be ratified by the body at subsequent conventions.

III. PROCEDURE

Modifications and Amendments:

1. Critical Change Required -
   A. If the National Executive Board (NEB) or National Advisory Council (NAC) determines that there are critical changes to the Policies and Procedures Manual that need to be addressed in between Conventions the critical change should be referred to the National Policies and Procedures Committee for drafting and analysis. The committee shall provide proposed language and recommendations to the NEB/NAC for review. The NEB will approve and distribute the new policy. New policies and procedures and/or amended policies and procedures shall be forwarded to the body within two (2) weeks of approval.

2. After National Convention -
   A. Bylaw(s) that are adopted at the National Convention that require clarification by way of a policy and procedure shall be submitted to the National Policies and Procedures Committee from the National Bylaw Committee no later than thirty (30) calendar days after the close of the National Convention.

   B. Within thirty (30) calendar days of receipt of the bylaw(s), the Policies and Procedures Committee shall develop appropriate procedures and/or policy to clarify the new bylaw(s) and submit to the National Executive Board (NEB) for review. The NEB shall give the regional
Jack and Jill of America, Inc. – Policies and Procedures

elected officers ten (10) days to review the proposed policy/procedure and submit any recommendations. Upon receipt of the recommendations from the regional elected officers, the NEB shall have up to thirty (30) calendar days for further review, approval and distribution to the body.

IV. AFFECTED PARTIES

Chapters, Regional Officers, Directors, National Executive Board
I. PURPOSE

The purpose of this policy is to clarify how to resolve conflicts between the Policies and Procedures Manual and any other Jack and Jill of America, Inc. governing document.

II. POLICY

1. The Charter (Certificate of Incorporation) is the highest ranking governing document for Jack and Jill of America, Inc. The National Constitution and Bylaws is the next highest-ranking document.

2. Governing documents for Jack and Jill of America are as follows:
   A. Charter
   B. Constitution and Bylaws
   C. Resolutions
   D. Policies and Procedures
   E. Financial Handbook
   F. Member Handbook

3. Supplemental publications include but are not limited to:
   A. Member Manual

4. Roberts Rules of Order is consulted and prevails when our governing documents are silent on an issue.

III. PROCEDURE

1. Any document that contains provisions that are in conflict with any of the provisions in the Charter and/or the National Constitution and Bylaws is void. Any actions taken in reliance on the void provisions are also considered void.

2. If there are conflicts between the Charter and any other document, the Charter shall prevail. If there are conflicts between the National Constitution and Bylaws and the Policies and Procedures Manual, Financial Handbook, or Resolutions, the National Constitution and Bylaws shall prevail.

3. If there are conflicts between the Policies and Procedures Manual, Financial Handbook, and Resolutions, the conflict shall be documented and forwarded to
the National President or her designee following the proper chain of command (i.e. mother member to chapter president, to regional director, to National Officer). The National President with approval from the National Executive Board shall resolve all such conflicts.

4. All requests for interpretations of any information contained in the *Policies and Procedures Manual, Financial Handbook*, or Resolutions shall be documented and forwarded to the National Corresponding Secretary (NCS) following the proper chain of command (i.e. mother member to chapter president, to regional director, to NCS). The National Corresponding Secretary shall provide such interpretation with the approval of the National President and/or the National Executive Board.

**IV. AFFECTED PARTIES**

Chapters, Regional Officers, National President, National Executive Board
### I. PURPOSE

The purpose of this policy is to outline the process to transfer power from the National Executive Board (NEB) to the National Advisory Council (NAC) should this be required to prevent an operational or service failure in the organization.

### II. POLICY

This procedure shall only be triggered when it has been determined that the National Executive Board cannot fulfill its responsibilities and/or function and as a result, the everyday operations and functioning of the organization are in jeopardy. This procedure shall only be used in an extreme emergency to prevent an operational or service failure in the organization.

### III. PROCEDURE

1. Upon notice of an operational or service failure of the organization, the National Advisory Council (NAC) shall be convened by two thirds (2/3) vote of the NAC. The sole purpose of the meeting is to determine if the everyday operations and functioning of the organization are in jeopardy and if so, vote to convene a special meeting of the chapter presidents.

2. The special meeting of the chapter presidents shall be for the sole purpose of transferring the authority and power for transacting the business of the national organization between Conventions to the NAC.

3. The NAC shall convene a special meeting of the chapter presidents as soon as possible. The NAC shall present concrete evidence regarding the urgency and necessity of a transfer of power to those in attendance. A two thirds (2/3) vote of the chapter presidents is required for the transfer of power from the NEB to the NAC. In order for the action to be binding, a quorum of the chapter presidents must be present and voting.

### IV. AFFECTED PARTIES

All Members
Section 2 – National Operations
I. PURPOSE

The purpose of this policy is to clarify the process of filling a vacancy occurring during the term of a National Officer.

II. POLICY

Any vacancy in a National Office occurring between National Conventions shall be filled by appointment from the National President with the approval of the National Executive Board with a candidate from the region that has lost representation due to the vacancy. Candidates for appointment must meet eligibility requirements of the position as stated in the National Constitution and Bylaws to the extent possible. The exception shall be a vacancy in the office of the National President, which shall automatically be filled by the National Vice President.

III. PROCEDURE

In the event of any vacancy on the National Executive Board, the National President shall appoint a candidate from the Region that lost representation.

1. Candidates for appointment must meet the eligibility requirements, for the vacant office as stated in the National Constitution and Bylaws. Should there be no qualified candidate who meets the eligibility requirements of the vacant office within the region, the National Executive Board shall make those adjustments and appointments necessary to manage the organization and prevent disruption.

2. The National President shall confer with the Regional Team for possible candidates.

3. The National President may confer with Chapter Presidents in the respective Region.

4. The National President may request resumes outlining Jack and Jill experience from potential candidates.

5. The National President shall make the final appointment subject to the approval of the National Executive Board.
IV. AFFECTED PARTIES

The Regional Team and Members of the Region where the vacancy occurred, National Advisory Council, National Executive Board
I. PURPOSE

The purpose of this policy is to address the definition, appointment, and dissolution of National Standing and National Ad Hoc Committees.

II. POLICY

The organization shall use standing and ad hoc committees to assist the National Executive Board in managing and conducting the business of the organization between conventions. A Standing Committee is one that is formed to perform a continuous function and responsibility of the organization.

Ad Hoc or Special Committees are appointed to carry out a specific task and at the completion of the task the committee automatically ceases to exist.

III. PROCEDURE

National Standing Committees

1. The National Standing Committees listed in the Jack and Jill of America, Inc. National Constitution and Bylaws are Nominating, Fathers’ Auxiliary, and Legislative.

2. The Fathers’ Auxiliary and Legislative National Committees shall be composed of seven members, one from each region, who shall be recommended by their respective Regional Director and National Officer.

3. The Nominating Committee shall be composed of seven members, one from each region. The Nominating Chair from each Regional Nominating Committee, who is voted on by the body of the respective region at the Mothers’ Regional Conferences, shall serve on the National Nominating Committee. The Chair of the National Nominating Committee shall be rotated among the regions in alphabetical order. For further information on the Nominating Committee, please refer to Section 4, Election Procedures in this manual.

4. All National Standing Committee chairs and members shall serve concurrent terms to the National Executive Board. No appointed chair or member shall serve more than two terms in succession.
5. Standing Committee members and chairs can be removed by the National President with approval by the National Executive Board.

**Ad Hoc Committees**

1. National Ad Hoc Committee members and chairs shall be appointed by the National President at the National Convention, or in the interim, with the approval of the National Executive Board.

2. All National Ad Hoc Committee chairs and members shall serve concurrent terms to the National Executive Board. No appointed chair or member shall serve more than two terms.

3. National Ad Hoc Committee chairs and members can be removed by the National President with approval of the National Executive Board.

**IV. AFFECTED PARTIES**

Chapters, Regional Officers, National President, National Executive Board
I. PURPOSE

The purpose of this policy is to define the composition of the National Advisory Council (NAC) and clarify their role, responsibilities and function.

II. POLICY

The NAC shall consist of the seven (7) Regional Directors and the seven (7) National Officers. The NAC exists to provide a broader governance structure for the organization on certain issues. The NAC shall meet on issues that affect the organization on a national, regional and chapter level. The NAC shall have as many meetings as needed to conduct the business of Jack and Jill of America Inc., but in no event less than three (3) meetings between conventions.

III. PROCEDURE

1. NAC meetings are called by the National Vice President.

2. NAC review and approval may be required for:
   A. Grievance Appeals
   B. Issues that have a serious impact on Regions or have primarily a regional focus.

IV. AFFECTED PARTIES

National Advisory Council
I. PURPOSE

The purpose of this policy is to provide the organization with a method and process to convene meetings outside of the biennial National Convention.

II. POLICY

The organization shall convene meetings when needed outside of the National Convention pursuant to the authority set forth in the National Constitution and Bylaws. The meetings shall be called Special Meetings.

III. PROCEDURE

1. Special Meetings of the national organization may be called by the National President or at the request of the National Advisory Council through the National Corresponding Secretary for the purpose of discussing and voting on urgent business matters requiring a decision prior to the next National Convention.

2. Notice of a special meeting must be given to members in writing by the National Corresponding Secretary not less than fourteen (14) days prior to the proposed Special Meeting date. Such notice shall state specifically the matters to be addressed at the Special Meeting.

3. A quorum must be present at all Special Meetings. The voting strength required on any decision is the majority of the body present and the actions are binding.

IV. AFFECTED PARTIES

All Members
I. PURPOSE

The purpose of this policy is to define the process for a third party vendor use or sell products for profit bearing the Jack and Jill of America, Inc. registered trademark logo.

II. POLICY

Jack and Jill of America, Inc. is entitled to the exclusive use of its trademark logo. Any person or entity that wants to design, manufacture, display, market or sell merchandise imprinted, emblazoned, embossed, or stamped with the Jack and Jill of America, Inc. trademark logo must enter into a License Agreement with Jack and Jill of America, Inc. Unless a designer, manufacturer, or vendor has obtained a license from Jack and Jill of America, Inc. the person may not design, make, copy, manufacture, or sell any merchandise bearing the Jack and Jill of America, Inc. trademark logo.

III. PROCEDURE

1. Any person or entity that wants to design, manufacture, display, market or sell merchandise imprinted, emblazoned, embossed, or stamped with the Jack and Jill of America, Inc. trademark logo must apply for a license with Jack and Jill of America, Inc. by submitting an application to the National Headquarters office. Applications for License Agreements are available on the national website. Applications must be submitted to the National Headquarters office along with samples or pictures of merchandise to be designed, sold, or displayed before any design, sale, display, or marketing of any such merchandise.

2. All applications will be reviewed and a decision rendered within twenty (20) days of receipt by the National President, her designee, or the Executive Director. A license agreement will be executed and provided to any approved person or entity.

3. Jack and Jill of America, Inc. shall have on file a license agreement (with a sample or photo) with persons or entities that meet its requirements and specifications for designing, manufacturing, selling or displaying merchandise bearing the Jack and Jill of America, Inc. trademark logo.
Jack and Jill of America, Inc. – Policies and Procedures

4. All merchandise bearing the Jack and Jill of America, Inc. logo shall be of good quality and shall be presented in good taste.

5. Jack and Jill of America, Inc. will not issue a license for the design, manufacture, display, marketing, or sale of merchandise that conflicts with its mission and/or policies, portrays it in a negative manner or causes ridicule.

6. FEES - Every application shall be accompanied by a license fee. The license fee is $1500 annually.

7. The license is not transferable. Jack and Jill of America, Inc. reserves the right to withdraw the License and terminate the associated License Agreement of any vendor that violates the License Agreement.

IV. AFFECTED PARTIES

All persons or entities wanting to use the Jack and Jill of America, Inc. trademark logo
Section 3 – National Conferences and Conventions
I. PURPOSE

The purpose of this policy is to clarify the requirements of Ceremonial Attire in Jack and Jill of America, Inc, and define the instances where Ceremonial “uninterrupted white” attire must be worn.

II. POLICY

Ceremonial “uninterrupted white” attire must be worn by all members and female teens participating in or attending the following Jack and Jill of America, Inc ceremonies:

1. Formal Opening at National Convention and Regional Conference
2. New Member Initiation
3. Officer Installation
4. New Chapter Chartering
5. Rededication
6. Memorial Services at National and Regional meetings

III. PROCEDURE

**Mothers and Female Teens**
All Mothers and female teens participating in or attending any Jack and Jill of America, Inc. ceremony must wear “uninterrupted white” attire as described below.

1. Dresses or skirt suits – No pants are allowed
2. Dresses or shirts with spaghetti straps are not allowed unless shoulders are covered (wear white jacket or sweater)
3. White or flesh tone stockings
4. Closed toe, peep toe shoes and sling backs allowed – No sandals are allowed

**Male Teens and Male Chaperones**
All male teens and male chaperones participating in or attending any Jack and Jill of America, Inc. ceremony must wear:

1. White shirt
2. Dark tie
3. Dark slacks
4. Dark jacket (optional)
5. Dark closed shoes
6. Dark socks
Not adhering to the ceremonial dress code described above will result in the affected party not being admitted to the ceremony.

IV. AFFECTED PARTIES

All Officers, Associate Members, Fathers, Mother Members, Teens, Teen Chaperones
Section 4 – Election Procedures
I. PURPOSE

The purpose of this procedure is to establish a standard format for conducting elections at all levels of the Organization. For more information regarding the details of the election and campaign process, please refer to “Election, Nominating and Campaign Guidelines” in the Appendix of this Manual.

II. POLICY

Jack and Jill of America, Inc. wants to attract and select the very best of our membership to serve as officers of this Organization. To do this, we must establish standardized, fair, transparent and inclusive election processes that shall be used at all levels of this Organization. The procedures set forth below are the minimum requirements for conducting elections at any level (Chapter, Regional or National).

1. Nominating Committee
   A. A nominating committee must be established prior to the start of the election process or campaign season.
      i. The National Nominating Committee is comprised of the Regional Nominating Committee Chairs from each of the seven regions. The National Chairperson shall rotate among the seven regions in alphabetical order by region.
      ii. The Regional Nominating Committee is comprised of seven members elected from seven different chapters.
          1. Nominees must be registered attendees at the Regional conference.
          2. Nominees cannot be a current National or Regional officer.
          3. No member may serve more than two consecutive terms on the committee.
          4. The Regional Chairperson shall be the person receiving the highest number of votes.
      iii. The Nominating Committee of a chapter is comprised of members elected by the body during a meeting of the general assembly.
          1. The Chapter Chairperson shall be the person receiving the highest number of votes.
   B. Members of the Nominating Committee must be unbiased and remain neutral while performing their committee duties.
i. Members of the Nominating Committee cannot campaign for a particular candidate during general meetings of the assembly.

ii. Members of the Nominating Committee cannot wear or hold campaign materials for a particular candidate during general meetings of the assembly.

iii. A member of the nominating committee who is found campaigning for a particular candidate during general meetings of the assembly or acting in a biased manner shall be removed from the Nominating Committee.

2. Tellers
   A. The Presiding Officer shall appoint Tellers to administer the balloting process, count votes, and certify election results prior to elections.

3. Eligibility to Run for Office
   A. A member desiring to run for office must be a member in good standing at all levels of the Organization (Chapter, Regional and National) when the nomination is accepted.
      i. The member must remain a member in good standing at all levels of the Organization throughout the election process and their tenure in office.
      ii. Should an officer be found non-compliant with any of the Organization’s governing documents, she will be deemed ineligible and immediately removed from slate/office.
      iii. Should a Regional or National Officer’s chapter be suspended or terminated during their tenure in office, the officer will be deemed ineligible, and immediately removed from office.
   B. A member desiring to run for an elected office must meet the requirements for that office as set forth in the appropriate governing documents.
   C. A candidate for National or Regional office must be registered and in attendance at the convention/conference in which the election is held.

4. Campaigns
   A. The Nominating Committee shall set forth, in writing, the specific campaign procedures that must be followed by all candidates for office. Guidelines for campaigning are contained in the Appendix of this Manual.

5. Elections
   A. The Nominating Committee shall prepare the ballot of slated candidates for elections at all levels of the Organization.
   B. The Presiding Officer shall conduct elections at all levels of the Organization.
   C. The Tellers shall administer the ballot process during elections, count properly cast ballots and certify election results at all levels of the
III. PROCEDURE

1. Nominating Committee
   A. At all levels of the Organization, the Nominating Committee shall announce, via email and the appropriate website (Chapter, Regional, or National), the opening of the campaign season at least ninety (90) days prior to Election Day.
   B. The announcement shall include:
      i. The names of the open positions
      ii. The minimum requirements to be a candidate for open positions
      iii. Any deadlines for submitting documentation necessary to declare a member’s candidacy for a particular office
      iv. The date and location of the election
   C. Once the deadline for declaring to run for office has passed, the nominating committee shall clear the credentials of potential candidates and publish (via email and the appropriate website) a slate of names for each office.
   D. The Nominating Committee shall also publish (via email and the appropriate website) the specific campaign procedures and guidelines that all candidates must follow throughout the remainder of the campaign season.
   E. The Nominating Committee shall be available to answer campaign questions.
   F. The Nominating Committee may provide opportunities for the candidates to address the body during general meetings/conferences/conventions.
   G. The Nominating Committee shall prepare a ballot of slated candidates for use during the election.

2. Running for Office (Eligibility)
   A. A candidate must remain a member in good standing at all levels of the Organization (Chapter, Regional and National) throughout the election process and their tenure in office.
   B. A candidate must meet all minimum requirements for an office at the time they announce their candidacy.
      i. If at any time during the campaign season, the candidate fails to meet the minimum requirements for the position, she will be disqualified and immediately removed from the slate of candidates for office.
   C. A candidate must be in compliance with all campaign procedures and guidelines as published by the Nominating Committee throughout the campaign.
      i. Should a candidate be found non-compliant with published campaign procedures and guidelines, she will be disqualified
and immediately removed from the slate of candidates for office.

D. A candidate for National or Regional office must be registered and in attendance at the convention/confrence in which the election is held.
E. A candidate for National or Regional office must have attended the required conferences in the region in which they are seeking office, unless they have moved their permanent residence to the region for which they are seeking office.

3. Campaigns
   A. The Nominating Committee shall set forth, in writing (via email and the appropriate website), the specific campaign procedures that must be followed by all candidates for office.
   B. The Nominating Committee shall set forth, in writing (via email and the appropriate website), the process for un-slated candidates (referred to as candidates that “come from the floor”.)

4. Elections at all levels of the Organization
   A. The Nominating Committee shall:
      i. Prepare the ballot of slated candidates
   B. The Presiding Officer shall:
      i. Conduct elections
      ii. Announce election results
   C. Tellers shall:
      i. Administer the balloting process, using a secret ballot process
         1. In the event that electronic balloting is used, the Tellers shall sit with the vendor, conduct sample/test balloting prior to the actual election, and personally observe the secret balloting process to ensure that the electronic equipment is working properly.
      ii. Count all properly cast ballots
      iii. Report election results to the Presiding Officer
      iv. Prepare a written report of the election process, including the results, for submission to the Recording Secretary.

IV. AFFECTED PARTIES
   All Members
Section 5 – Ethics
I. PURPOSE

The purpose of this procedure is to establish a Code of Ethics for Jack and Jill of America, Inc.

II. POLICY

Jack and Jill of America, Inc. must maintain standards that allow our members to serve as role models for our children and protect our organization from harassment, ridicule, scandal or legal liability.

Any member who violates the Code of Ethics (in whole or in part) shall be subject to disciplinary action up to and including termination of her membership in Jack and Jill of America, Inc.

This following Code of Ethics shall be binding on all members, chapters, regions, and officers of the organization.

1. Members shall maintain the highest ethical standards of conduct by adhering to the National Constitution and Bylaws of the Organization, the Jack and Jill of America, Inc. Member Handbook, and all governing documents of the organization.
   A. Members must abide by and support all official decisions at the chapter, regional and national levels.

2. Members shall present themselves publicly in ways that reflect the high moral and ethical character of Jack and Jill mothers by:
   A. Obeying all local, state, and federal laws, and;
   B. Refraining from acts of violence and criminal conduct.

3. When representing the organization in the community, members will conduct themselves in an appropriate manner.
   A. Members must be sensitive to the needs of the community
   B. Members must not discriminate based upon age, race, ethnicity, gender, disability, body type, religion, or fraternal affiliations.
   C. Members must not make derogatory, demeaning, and insulting remarks while representing the organization.
4. Members shall not misuse funds or monies raised in the name of the organization. Any funds raised in the name of the organization must be used for the stated purpose.
   A. Members are responsible for the proper use of any monies advanced to them by the organization. It is the responsibility of the member to return to the Organization any funds not used or needed for their stated purpose.

5. Members must be respectful of each other at all times.
   A. Members must not abuse others by fighting, using foul language, gossiping, making threats, or harassing another member.
   B. Members must be polite, kind, honest, fair, and conciliatory.
   C. Members must maintain confidentiality.

III. PROCEDURE

1. A member who is alleged to be in violation of the organization’s Code of Ethics shall become subject to the Grievance Process as outlined in this Manual.

2. A grievance based upon a violation of the Code of Ethics may be filed against the alleged violator by any member of this organization with the appropriate presiding officer in accordance with the Grievance Process outlined in this Manual.

IV. AFFECTED PARTIES

   All Members
I. PURPOSE

The purpose of this policy is to provide clarity on when members, employees or officers of Jack and Jill of America, Inc. must address conflict(s) of interest.

II. POLICY

No member, officer or employee of the Organization shall engage in any employment, activity, or enterprise from which the officer or employee receives compensation or has a financial interest and which is sponsored or funded by the Organization, unless the employment, activity or enterprise is required as a condition of regular employment of the Organization.

1. No member, officer or employee of the Organization shall contract on his/her own behalf as an independent contractor with the Organization to provide goods or services without full disclosure to the organization and where possible completion of a fair and equitable process.
2. Nothing in this Policy shall prohibit the Organization from retaining services or goods of a member provided there has been proper disclosure.

III. PROCEDURE

Once a conflict of interest issue has been identified, it should be documented and reported to the elected officer following chain of command (i.e. chapter member to chapter president, to regional director, to national officer and so on). The officer receiving the report shall investigate and render a decision. Appeals to the decision of the officer shall follow the Grievance Process. Members are encouraged to resolve all Conflicts of Interest at the lowest level possible.

IV. AFFECTED PARTIES

All Members
I. PURPOSE

The purpose of this policy is to address the issue of equipment that is leased or purchased with Jack and Jill of America, Inc. funds.

II. POLICY

Equipment can be leased or purchased at the Chapter, Regional or National levels. This Policy and Procedure addresses all equipment except for that which is at the National Headquarters office in Washington D.C.

To the extent possible, National, Regional and Chapter elected officers should not enter a contract to lease equipment for longer than their term in office.

III. PROCEDURE

Leased Equipment

1. If the equipment is leased at the local level, the Chapter President and Chapter Treasurer must sign the contract.
2. If the equipment is leased at the regional level, the Regional Director and Regional Secretary-Treasurer must sign the contract.
3. If the equipment is leased at the national level, the National President and the National Treasurer must sign the contract.
4. The leasing agreement must include insurance to cover damages and/or replacement of the equipment.
5. The equipment should be returned in accordance with the lease contract.
6. If the equipment is not returned according to the lease contract or is damaged, then the chapter, region, or national office shall be held financially responsible for any amount not covered by the insurance.
7. The lease should not exceed the term of the officer.

Purchased Equipment

1. The National Headquarters office shall publish a capitalization policy to be used at the region, if applicable, and national levels. This policy will set forth guidelines to determine whether equipment will be expensed or capitalized.
2. Any equipment that is purchased at the regional level shall be the responsibility of the Regional Director. When there is a change in Regional officers, all equipment owned by the region that still has a useful life shall be physically transferred to the new Regional Director within sixty (60) days of
the installation of the new regional officers. Failure to comply with this policy will jeopardize the membership status of the outgoing officer.

3. If the equipment has no more useful life, then the newly installed Regional Director must write a memorandum stating this fact. This memorandum should be filed with the Regional-Secretary Treasurer.

4. Any equipment that is purchased at the National level shall be the responsibility of the National President. When there is a change in National officers, all equipment owned by national that still has a useful life shall be physically transferred to the new National Officer within sixty (60) days of the installation of the new national officers. Failure to comply with this policy will jeopardize the membership status of the outgoing officer.

5. If the equipment has no more useful life, then the newly installed National President must write a memorandum stating this fact. This memorandum should be filed with the Executive Director.

IV. AFFECTED PARTIES

Chapters, Regional Director, National President, Executive Director
Section 6 – Grievance and Discipline
I. PURPOSE

The purpose of this policy is to establish the Grievance Process for members of Jack and Jill of America, Inc.

II. POLICY

A person aggrieved by the action of a member of the organization, may seek redress by filing a grievance pursuant to the process outlined below.

The National Grievance process is binding on the members, chapters, regions, and national officers of the organization.

1. The term “grievance” shall refer to any complaint for good cause shown by a member who reasonably believes she has suffered an injustice or injury directly resulting from:

   A. An action or a failure to take action, or a violation of the Code of Ethics, National Constitution and Bylaws, or other governing documents of this organization; or
   B. A breach of the fiduciary duties of this organization by any other member, organized body, or collective group authorized to conduct the business of Jack and Jill of America, Inc. at any level of the organization.

2. Members should try to resolve all disputes informally or at the lowest possible level (chapter or regional). The grievance process should be considered the option of last resort, with members having exhausted all other remedies to resolve disputes.

3. Should an informal resolution not be possible; a member should submit a written grievance on the National Grievance Form (available on the Jack and Jill of America, Inc. national website) to the appropriate presiding officer for resolution.

4. The costs of filing the grievance, including all copies and mailings, as well as any attorney fees associated with the communications between the member’s attorney and the National Executive Board shall be borne by the person making the grievance (grievant) or the person against whom the grievance has been filed (respondent) as appropriate. The grievant or respondent will be
billed for these costs.

5. A grievance must be “accepted” by the presiding officer before the process can be utilized. Frivolous or baseless complaints nor gratuitous personal attacks will not be accepted as appropriate subject matter for a grievance and shall not be addressed through this process. Any such grievances will be returned without action.

6. Should Jack and Jill of America, Inc. incur attorneys’ fees and/or costs in having to respond or defend a grievance, said attorney fees shall be assessed against and borne by the grieving party.

III. PROCEDURE

The Grievance Process

1. Grievance Against Chapter Member or Chapter Officer

A. If a member has a grievance against a member from her own chapter, a written grievance should be submitted to her local presiding officer - the Chapter President, for resolution.
   i. In the event that the grievance is against the local Chapter President, the next highest officer at the chapter level shall preside over the grievance. However, in this instance, the grievant reserves the right to bypass the local chapter and file the grievance directly with the Regional Director.
   ii. The written grievance shall include the alleged violation, the specific act(s) leading to the violation, and the remedy being sought.
   iii. Once the grievance is accepted, the respondent will receive a copy of the grievance form and have seven (7) days to respond, in writing, to the local presiding officer.
   iv. At the end of the seven (7) day response period, the local presiding officer shall convene the Chapter Grievance Committee. A written decision from the Chapter Grievance Committee must be supplied to the grievant and respondent within fourteen (14) days of the receipt of the respondent’s written response or the end of the seven (7) day response period.

B. If either party (the grievant or respondent) is not satisfied with the local Chapter Grievance Committee’s decision, the decision can be appealed to the Regional Director.
   i. The written appeal from the grievant or respondent must be filed within ten (10) days of the original decision, and shall include all written correspondence from the initial grievance, including the decision of the local grievance committee.
ii. The Regional Grievance Committee will have fourteen (14) days to render a written decision on the appeal.

C. If either the grievant or respondent remain unsatisfied with the decision of the Regional Grievance Committee, the decision can then be appealed, in writing, to the National Advisory Council (NAC).

   iii. The NAC shall have thirty (30) days to render its decision, along with its rationale to the member, the chapter, and the appropriate region by registered letter.

   iv. The decision of the NAC shall be final.

2. Grievance Against Regional Officer
   A. In the event that the grievance is against a Regional Officer, arising from her conduct as a Regional Officer (and not her role as a local chapter member), the grievant shall file her written grievance directly with the NAC.

      i. The written grievance shall include the alleged violation, the specific acts leading to the violation, and the remedy being sought.

      ii. Once the grievance is accepted, the respondent will receive a copy of the grievance form and have seven (7) days to respond, in writing, to the presiding officer - the National President.

      iii. At the end of the seven (7) day response period, the presiding officer shall convene the NAC.

      iv. The NAC shall have thirty (30) days to render its decision, along with its rationale to the member, respondent, and the appropriate region by registered letter.

   B. If either party (the grievant or respondent) is not satisfied with the decision of the NAC, the party can request a review of the decision to the NEB, by submitting any additional information they want considered, in writing, to the presiding officer – the National President.

      i. Once the review request and additional information is accepted, the respondent will receive a copy of the review request and supporting documents and have seven (7) days to respond, in writing, to the presiding officer.

      ii. At the end of the seven (7) day response period, the NEB shall have fourteen (14) days to render its final decision on the review request, along with its rationale to the member, respondent, and the appropriate region by registered letter.

      iii. The decision of the NEB shall be final.

3. Grievance Against a National Officer
   A. In the event that the grievance is against a National Officer, arising from her conduct as a National Officer (and not her role as a local
chapter member), the grievant shall file her written grievance directly with the NEB.
  i. The written grievance shall include the alleged violation, the specific acts leading to the violation, and the remedy being sought.
  ii. Once the grievance is accepted, the respondent will receive a copy of the grievance form and have seven (7) days to respond, in writing, to the presiding officer - the National President.
  iii. In the event that the grievance is against the presiding officer - the National President, the next highest officer at the national level shall preside over the grievance.
  iv. At the end of the seven (7) day response period, the presiding officer shall convene the NAC.
  v. The NAC shall have thirty (30) days to render its decision, along with its rationale to the member, respondent, and the appropriate region by registered letter.

B. If either party (the grievant or respondent) is not satisfied with the decision of the NAC, the party can request a review of the decision, by the NEB, by submitting any additional information to be considered, in writing, to the presiding officer – the National President. In the event that the grievance is against the presiding officer – the National President, the next highest officer at the national level shall preside over the review.
  i. Once the review request and additional information is accepted, the respondent will receive a copy of the review request and supporting documents and have seven (7) days to respond, in writing, to the presiding officer.
  ii. At the end of the seven (7) day response period, the NEB shall have fourteen (14) days to render its final decision on the review request, along with its rationale to the member, respondent, and the appropriate region by registered letter.
  iii. The decision of the NEB shall be final.

IV. AFFECTED PARTIES

All Members
I. PURPOSE

The purpose of this policy is to clarify and outline the circumstances in which penalties are imposed upon National, Regional or Chapter Elected Officers.

II. POLICY

**National Officer**

1. A National Officer is subject to discipline if she:
   A. Fails to perform the duties of her office as outlined in the *National Constitution and Bylaws* or other governing documents of the Organization.
   B. Fails to perform the duties of her office as outlined in this Manual.

2. An outgoing National Officer is also subject to discipline if she fails to affect an orderly transition between outgoing and incoming officers, as defined in the *National Constitution and Bylaws*.

3. The penalties allowed are as follows and must be sanctioned by the National Executive Board:
   A. Fines/Sanctions – Monetary penalty or Letter of Reprimand. This penalty shall be imposed for inadvertent financial issues, such as not providing timely information to the Organization’s financial officers as defined in the *National Constitution and Bylaws*.
      i. This penalty may be combined with other penalties depending on the severity of the infraction.
   B. Probation – The probation period and specific conditions of the probation will be determined by the NEB.
      i. May be imposed when a National Officer violates the Organization’s governing documents or displays unacceptable or libelous conduct.
      ii. A member on probation may not run for any other Local, Regional or National Office, nor may she be appointed to any Regional or National Committee.
      iii. This penalty can be combined with an appropriate fine.
C. Suspension – The suspension period and specific conditions of the suspension as determined by NEB, following a thirty (30) day grace period.
   i. May be imposed when a National Officer fails to meet financial obligations, including per capita or assessments, or fails to give financial support to the Jack and Jill of America Foundation, Inc.
   ii. May be imposed when a National Officer violates the Organization’s governing documents or displays unacceptable or libelous conduct.
   iii. A member on suspension is not considered active and is NOT in “good standing”. She forfeits all rights to active membership.

D. Termination
   i. This penalty should only be imposed as a last resort, upon a two thirds (2/3) vote of the NAC.
   ii. May be imposed when a National Officer fails to meet financial obligations including per capita or assessments, or fails to give financial support to the Jack and Jill of America Foundation, Inc.
   iii. May be imposed when a National Officer violates the Organization’s governing documents or displays unacceptable or libelous conduct.
   iv. May be imposed when a National Officer commits a crime.
   v. A terminated member forfeits all rights to membership.

Regional Officer
1. Regional Officer is subject to discipline if she:
   A. Fails to perform the duties of her office as outlined in the National Constitution and Bylaws or other governing documents of the Organization.
   B. Fails to perform the duties of her office as outlined in her Region’s Policies and Procedures Manual.
2. An outgoing Regional Officer is also subject to discipline if she fails to affect an orderly transition between outgoing and incoming officers, as defined in the National Constitution and Bylaws.
3. The penalties allowed are as follows and must be sanctioned by the National Executive Board or in appropriate circumstances approved by the National Advisory Council (NAC):
   A. Fines/Sanctions – Monetary penalty or Letter of Reprimand. This penalty may be imposed for minor infractions or where there are substantial mitigating factors.
      i. This penalty may be combined with other penalties depending on the severity of the infraction.
B. Probation – The probation period and specific conditions of the probation will be determined by NEB or in appropriate circumstances the NAC.
   i. May be imposed when a Regional Officer violates the Organization’s governing documents or displays unacceptable or libelous conduct.
      ii. A member on probation may not run for Local, Regional or National Office, nor may they be appointed to any Regional or National Committee.
      iii. This penalty can be combined with an appropriate fine.

C. Suspension – The suspension period and specific conditions of the suspension as determined by the NEB or in appropriate circumstances the NAC, following a thirty (30) day grace period.
   i. May be imposed when a Regional Officer fails to meet financial obligations, including per capita or assessments, or fails to give financial support to the Jack and Jill of America Foundation, Inc.
   ii. May be imposed when a Regional Officer violates the Organization’s governing documents or displays unacceptable or libelous conduct.
   iii. A member on suspension is not considered active and is NOT in “good standing”. She forfeits all rights to active membership.

D. Termination
   i. This penalty should only be imposed as a last resort, upon two thirds (2/3) vote of the chapter delegates of the region.
   ii. May be imposed when a Regional Officer fails to meet financial obligations, including per capita or assessments, or fails to give financial support to the Jack and Jill of America Foundation, Inc.
   iii. May be imposed when a Regional Officer violates the Organization’s governing documents or displays unacceptable or libelous conduct.
   iv. May be imposed when a Regional Officer commits a crime.
   v. A Regional Officer that fails to complete the requirements of an imposed suspension or probation shall be terminated upon a thirty (30) day notice, from the National Executive Board.
   vi. Terminated members forfeit all rights to membership.

Chapter Officers
1. A Chapter Officer is subject to discipline if she:
A. Fail to perform the duties of her office as outlined in the National Constitution and Bylaws or other governing documents of the Organization, including Chapter Bylaws.
B. Fail to perform the duties of her office as outlined in the National, Region and Chapter Policies and Procedures.

2. An outgoing Chapter Officer is also subject to discipline if she fails to affect an orderly transition between outgoing and incoming officers, as defined in the National Constitution and Bylaws, Regional Policies and Procedures and Chapter Bylaws.

3. The penalties allowed are as follows and must be sanctioned by the Chapter members and Chapter Executive Board.
   A. Fines/Sanctions – Monetary penalty or Letter of Reprimand.
      This penalty shall be imposed for inadvertent financial issues, such as not providing timely information to the Organization’s financial officers or Region and/or members.
      i. This penalty may be combined with other penalties depending on the severity of the infraction.
      B. Probation – The probation period and specific conditions of the probation will be determined by the Chapter.
         i. May be imposed when a Chapter Officer violates the Organization’s governing documents or displays unacceptable or libelous conduct.
         ii. A member on probation may not run for Local, Regional or National Office, nor may she be appointed to any Regional or National Committee.
         iii. This penalty can be combined with an appropriate fine.
   C. Suspension – The suspension period and specific conditions of the suspension as determined by the Chapter and shall follow a thirty (30) day grace period.
      i. May be imposed when a Chapter Officer fails to meet financial obligations, including per capita or assessments, or other infractions outlined in Chapter governing documents.
      ii. May be imposed when a Chapter Officer violates the Organization’s governing documents or displays unacceptable or libelous conduct.
      iii. A member on suspension is not considered active and is NOT in “good standing”. She forfeits all rights to active membership.
   D. Termination
      i. This penalty should only be imposed as a last resort, as the Chapter Bylaws.
      ii. May be imposed when a Chapter Officer fails to meet financial obligations, per capita or assessments, or
fails to give financial support as outlined in Chapter
governing documents.

iii. May be imposed when a Chapter Officer violates the
Organization’s governing documents or displays
unacceptable or libelous conduct.

iv. May be imposed when a Chapter Officer commits a
crime.

v. A Chapter Officer that fails to complete the
requirements of an imposed suspension or probation
shall be terminated upon a thirty (30) day notice,
subject to the approval of the Chapter Executive
Board.

vi. Terminated Members forfeit all rights to membership.

III. PROCEDURE

1. National Officer
   A National Officer who fails to fulfill the duties of her office shall be
   removed from office upon the vote of two thirds (2/3) of the NAC.
   A. The discipline process for a National Officer shall be
      followed in accordance with the Grievance Process defined in
      this Manual.
   B. Two thirds (2/3) vote of the NAC is required to terminate or
      remove a National Officer.
   C. Should the decision be made to terminate the membership of
      the National Officer, the process followed shall be in
      accordance with the Termination of Membership Policy
      defined in this Manual.

2. Regional Officer
   A. The discipline process for a Regional Officer shall be
      followed in accordance with the Grievance Process defined in
      this Manual.
   B. Two thirds (2/3) vote of the Chapter Delegates of a Region is
      required to terminate or remove a standing Regional Director.
   C. Should the decision be made to terminate the membership of
      the Regional Officer, the process followed shall be in
      accordance with the Termination of Membership Policy
      defined in this Manual.

3. Chapter Officers
   Discipline for Chapter Officers will follow the organization’s
   governing documents with deference given to the Chapter governing
documents (i.e. Chapter Bylaws, Chapter Policies and Procedures).
IV. AFFECTED PARTIES

National Executive Board, National Advisory Council, Regional Officers, Chapter Officers
I. PURPOSE

The purpose of this policy is to clarify the circumstances under which penalties may be imposed upon chapters, who may impose such penalties and to describe the potential penalties.

II. POLICY

Chapters who fail to comply with regional and/or national requirements of the organization may be subject to disciplinary action by the NAC or NEB. Disciplinary action may include a range of penalties including fines, fees, probation, suspension, and/or chapter termination as described below.

1. Fines/Sanctions
   A. A fine, recommended by the regional or national budget committee and approved by voting delegates, shall accompany all delinquent per capita tax reports, financial statements or other assessments.

2. Fees
   A. Fees, such as those for insufficient funds, shall be paid by the local chapter.

3. Probation
   A. A chapter shall be placed on probation following a thirty (30) day written notification from the National Executive Board. The probation period and specific conditions of the probation will be determined by the NEB. Such probation shall be imposed under the following circumstances.
      i. A chapter’s level of participation falls below the minimum requirement.
      ii. A chapter violates chapter or national bylaws.
      iii. A chapter displays unacceptable or libelous conduct.

4. Suspension
   A. Chapters that fail to pay financial obligations, including per capita or assessments, or that fail to give financial support to the Jack and Jill of America Foundation, Inc. shall be suspended, following a thirty (30) day grace period, subject to the approval of the National Executive Board. Suspended
5. **Termination**
   A. A Chapter that fails to complete the requirements of an imposed suspension or probation shall be terminated upon a thirty (30) day notice by the National Executive Board. Terminated chapters and the members thereof forfeit all rights to membership.

### III. PROCEDURE

**Chapter Penalties**

A Chapter that is not in compliance with Chapter, Regional or National requirements as outlined in the organization’s governing documents may be subject to disciplinary action up to and including termination.

The penalty process for all levels of penalties (fines-termination) is defined in the following 6 steps:

1. The Regional Director or the designated National Officer shall notify the Chapter, the Chapter’s mothers and the National Executive Board (NEB), in writing (certified US mail to the Chapter and NEB, email notification to chapter mothers), when it is in violation of the organization’s governing documents. The notice shall include the specific violation(s) which put the Chapter out of compliance with the organization’s governing documents.

2. The Chapter shall have fifteen (15) days to respond, in writing (certified US mail) to the notice.

3. Upon receipt of the Chapter’s written response, or upon completion of the fifteen (15) day period, the Regional Director and the Region’s National Officer shall have fifteen (15) days to recommend a course of action to the National Executive Board.

4. The National Executive Board shall issue a *Notice of Penalty* to be imposed on the Chapter within thirty (30) days of receipt of documentation (notice of the Chapter’s violation(s), the Chapter’s written response, and the Region’s recommended course of action). The written Notice of Penalty containing the NEB’s decision shall be sent to the Chapter (certified US mail), the Chapter’s mothers (email), the Regional Director and the Region’s National Officer (certified US mail).

5. The written *Notice of Penalty* from the NEB shall include the complete terms of the penalty imposed, including whether the Chapter mothers can run for
national or regional office or retain the ability of the chapter delegate to be seated at any conferences/conventions.

6. A Chapter may appeal the National Executive Board’s decision, in writing, within fifteen (15) days of receipt of the Notice of Penalty. The NEB will review the appeal request and issue a final decision within fifteen (15) days of receipt. The appeal process will be completed within a thirty (30) day cycle. Upon the conclusion of the appeal process, the NEB’s decision will be final.

Fines
Fines may be imposed when Chapters do not meet the stated deadlines for filing Per Capita Tax Reports, Financial Statements and other assessments.

1. The Regional and National Budget Committees shall make recommendations for the fines to be assessed for delinquencies in reporting. These fines must be approved by the voting delegates of the National Convention and the Regional Mothers’ Conference respectively.
   A. Fines for delinquent per capita tax reports, financial statements and other assessments shall be paid to the National Treasurer and/or Regional Secretary-Treasurer as appropriate.
   B. All National and Regional deadlines must be strictly adhered to.
   C. A minimum ten (10) calendar days notice will be sent before fines are assessed.

Fees
Fees are any amounts charged to the organization by third parties (i.e. banks) in the processing and/or collection of payments from Chapters.

1. Any fees, such as those imposed by banks for insufficient funds shall be paid by the local Chapter to the national or regional office, as appropriate.

Probation
The National Executive Board determines when a chapter shall be placed on probation based on the parameters set by the organization’s governing documents. The probation terms and conditions shall be determined by the National Executive Board.

1. A chapter shall be placed on probation following a thirty (30) day written notification from the National Executive Board with copies to the Regional Director. The probation period and specific conditions of the probation will be determined by the NEB. Such probation shall be imposed under the following circumstances.
   A. A chapter’s level of participation falls below the minimum requirement.
   B. A chapter is in violation of Chapter or National Bylaws.
   C. A chapter displays unacceptable or libelous conduct.
2. A Chapter must strictly adhere to the terms and conditions stipulated in the written probation notice issued by the National Executive Board.

3. A Chapter on probation is responsible for all Jack and Jill of America, Inc. obligations, financial and otherwise.

4. A Chapter on probation shall maintain their right to be seated at National Convention, Mothers and Teen Conferences as long as the Chapter is in strict compliance with the terms and conditions of the written probation notice.

5. Mothers and Teens shall not be eligible to run for or hold Regional or National office when a chapter is on probation.

6. A Chapter that does not successfully comply with the terms and conditions of its probation shall be subject to termination by the National Executive Board.

**Suspension**

The National Executive Board determines when a chapter shall be suspended based on the parameters set by the organization’s governing documents. The terms and conditions of the suspension shall be determined by the National Executive Board.

1. A Chapter shall be suspended following thirty (30) days written notice from the National Executive Board when:
   A. A Chapter fails to pay National or Regional financial obligations by stated deadlines.
   B. A Chapter fails to give financial support to the Jack and Jill of America Foundation, Inc.

2. Suspended Chapters forfeit all rights of active membership. However, a suspended chapter is still responsible for all Regional and National financial obligations, including any fees and/or fines, during its suspension.

3. Suspended Chapters shall not be seated at National Conventions, Mothers or Teen Conferences.

4. Mothers and Teens shall not be eligible to run for or hold Regional or National office when a chapter is suspended.

5. Names of suspended chapters shall be circulated to all chapters by the National Treasurer.

6. Chapters failing to abide by the terms and conditions of its suspension may be subject to termination.
Termination
The National Executive Board (NEB) determines when a chapter shall be terminated based upon the parameters set by the organization’s governing documents.

1. A Chapter shall be terminated following thirty (30) days written notice from the National Executive Board when:
   A. A Chapter fails to pay fines or fees assessed at the National or Regional levels.
   B. A Chapter fails to abide by the terms and conditions of a previously imposed suspension or probation.

2. The written notice of termination from the NEB shall include a list of any members who are eligible for transfer to another chapter.

3. Terminated Chapters forfeit all rights of membership. The members of the Chapter will not be listed on the membership rolls of Jack and Jill of America, Inc.

4. Terminated Chapters will not be seated nor listed at National Conventions, Mothers or Teen Conferences.

5. Mothers and Teens shall not be eligible to run for or hold Regional or National office when a chapter has been terminated.

IV. AFFECTED PARTIES
   Chapter, Chapter Members, Regional Director, National Officer of the Region, the National Executive Board
Section 7 – Membership
I. PURPOSE

The purpose of this policy is to clarify how existing members maintain their membership in Jack and Jill of America, Inc.

II. POLICY

A mother, female legal guardian, or female custodial caretaker of children between the ages of two (2) years and through their nineteenth (19) year may hold active membership in Jack and Jill of America, Inc. A female legal guardian or custodial caretaker may be required to produce legal documentation of her legal or custodial status.

A mother in “good standing” is defined as a mother who is both active and financial in the Organization.
1. Active – A member is active if she meets all of the participation requirements of the organization.
2. Financial - A member is financial when she is current on all Chapter, Regional and National dues, assessments and/or fees.

III. PROCEDURE

To maintain membership, all mother members must be in good standing throughout her tenure in the organization.

Active

1. A member must attend all meetings and activities as required by the local chapter bylaws and other governing documents.
2. A member must attend regional and national activities as required in the National Constitution and Bylaws.
3. A member on leave of absence is not active for the program year during which she is on leave.

Financial

1. A member must support the Jack and Jill of America Foundation, Inc. as required by her local chapter.
2. A member is responsible for local, region and national financial obligations (dues, assessments and/or fees). Any financial obligations not paid by the due date, as established by the local, region, and/or national office are deemed past due.
3. A member must pay all outstanding monies due, including late fees, to regain financial status.

Membership Status
1. A member who is not in good standing, places her membership in jeopardy.
   A. The member shall be notified by the chapter Vice-President, via certified mail, of her membership status, the corrective actions needed, and the deadline by which corrective actions must be completed.
   B. If the member does not correct the deficiencies as delineated in the written notification, her membership shall be subject to immediate termination.
   C. Termination decisions will follow the process outlined in the Termination of Membership policy in this Manual.

IV. AFFECTED PARTIES
All Members
I. PURPOSE

The purpose of this policy is to define the rights and responsibilities of a National Member.

II. POLICY

A member who transfers to an area where no chapter exists may hold active national membership in Jack and Jill of America, Inc. for up to five (5) years.

1. A new member may not apply for membership to this Organization through National Member status. She must join the Organization through a local chapter.

2. A member must maintain active membership and be in good standing with a local chapter for at least one (1) year before requesting a transfer to national membership.

III. PROCEDURE

1. National Membership

   A. A Mother may elect to become a National Member when she transfers to an area that does not have a local chapter (i.e. a foreign country).

   i. A mother that transfers to an area without a local chapter but within the 48 contiguous states or Alaska may also have regional membership.

   ii. A mother that transfers to an area outside the 48 contiguous states or Alaska where there is no local chapter cannot have regional membership.

   B. A National membership provides that:

   i. A National Member can attend national events.

   ii. Teens and children can attend national events, as appropriate.

   iii. A National Member that does not have regional membership cannot participate in regional activities.

   C. A National Member that has been granted regional membership provides that:

   i. The National Member can attend regional events.

   ii. Teens and children can attend regional events, as appropriate.
2. Financial Obligations
   A. A National Member is responsible for all financial obligations (dues, assessments and/or fees) as established by the National Organization.
      i. All payments must be made to the Jack and Jill of America, Inc. National Headquarters office.
      ii. Any financial obligations not paid by the established due dates are deemed past due.
      iii. A National Member must pay all outstanding monies due, including late fees, to maintain national membership. Failure to pay outstanding monies by the designated due date will result in immediate termination of national membership.
   B. A National Member with regional membership is responsible for all financial obligations (dues, assessments and/or fees) as established by the Region and National Offices.
      i. All national payments must be made to the National Headquarters office.
      ii. All regional payments must be made to the Regional Secretary-Treasurer and the Regional Secretary-Treasurer shall report receipt of such payments to the National Headquarters Office.
      iii. Any financial requirements not paid by the established due dates are deemed past due.
      iv. A National Member with regional membership must pay all outstanding monies due, including late fees, to maintain their national and regional memberships. Failure to pay outstanding monies by the designated due date may result in immediate termination of both national and regional memberships.

3. Membership Status
   A. A National Member is not considered “active”. To be considered active, as defined in the National Constitution and Bylaws, a mother member must participate at the local chapter level. Therefore:
      i. National Members are not eligible to serve on Regional and/or National Committees nor are they eligible to run for Regional or National office.
      ii. If a local chapter, Regional or National Officer/committee member changes membership status to that of a National Member, she may complete her tenure subject to the approval of the Regional Director and National Officer.
   B. Once a National Member has held this status for five (5) years, she must:
      i. Join a local chapter to continue her membership in the Organization; or
      ii. Reapply; or
iii. Resign her membership from the Organization, by writing to the National Corresponding Secretary. Failure to resign will result in termination of the national membership.

IV. AFFECTED PARTIES

National Members
I. **PURPOSE**

The purpose of this policy is to standardize the recruitment of new members into Jack and Jill of America, Inc. Additional information on recruitment of new members can be found in the *New Member Handbook* contained in the Appendix of this Manual.

II. **POLICY**

The recruitment of Jack and Jill of America, Inc. members should be limited to mothers, female legal guardians, or female custodial caretakers who have children between the ages of two (2) and nineteen (19) years old.

A candidate for membership must be sponsored by a current member in good standing.

If several chapters share the same boundaries, then chapters can recruit within the shared boundaries. Chapters must have a written boundary sharing agreement on file with the National Headquarters office in order to recruit within shared boundaries. If chapters do not share boundaries, they shall not recruit members outside of their boundaries.

Members who have not been in a chapter for more than three years, and are found to live outside of a chapter’s boundaries shall be transferred to the correct chapter at the beginning of the next program year.

III. **PROCEDURE**

1. The local chapter’s Membership Committee should report the following to the membership:
   A. The number of vacancies anticipated.
   B. The projected distribution of children, by age group and gender.
   C. The recommended number of new members.
   D. Confirm that prospective members live within the chapter boundaries.

2. The membership shall vote on the maximum number of new members to be invited to join the chapter, in accordance with the chapter’s charter and bylaws.

3. The recruitment process should include, but not be limited to, inviting the prospects and their children, if appropriate, to chapter activities. The
activities may include community service projects, fundraisers, Kwanzaa/holiday celebration, Jack and Jill Day, Black Family Day, or other group activities.

4. A fact sheet should be distributed to the membership that details the prospective member’s family (children’s name, age, and age group) and their community involvement.

5. The election shall be held in either March or April.

6. Before the election of new chapter members in March or April, the chapter may conduct a social activity for prospective members. The membership is invited and encouraged to attend the social activity to meet the prospective members. An overview of Jack and Jill of America, Inc. shall be given to inform prospective members about the organization’s national, regional, and local structure, as well as the chapter’s community involvement.

7. Elected candidates shall be invited to attend an orientation, which must occur prior to the initiation of new members.

8. Sponsors and Chapter Officers shall be invited to attend the Orientation. However, this does not preclude other members from attending.

9. At the orientation, the candidates will once again hear about the organization’s national, regional, and local structure. However, at this orientation emphasis is placed on the local chapter. Information presented should include membership and financial requirements, time commitments and leadership expectations as well as children’s participation.

IV. AFFECTED PARTIES

Chapters, Prospective Members
I. PURPOSE

The purpose of this policy is to define the process by which a member transfers to a different chapter.

II. POLICY

An active member, in good standing, who changes her place of residence outside her current chapter’s boundaries shall within a period of one (1) year of the change, transfer to the chapter within whose boundaries she now resides. If her new residence is not within a chapter’s boundaries, she may become a National Member. Transfers do not impact the receiving chapter’s membership quotas.

An active member, in good standing, with three (3) continuous years of service who changes her residence may choose to maintain her membership with her current chapter. If this option is chosen, the member must continue to fulfill all local chapter membership requirements.

III. PROCEDURE

1. Transfer Request
   A. A mother member shall submit a form for transfer to the local chapter Vice-President. The Member Transfer Request Form shall include her new address and the new desired local chapter, if known. P.O. Boxes are unacceptable.
   B. Once the local Vice-President has verified that the member is currently in good standing, the completed Member Transfer Request Form shall be forwarded to the National Corresponding Secretary and the National Headquarters office.
   C. The transfer process shall be completed within ninety (90) days of receipt by the National Corresponding Secretary or the National Headquarters office.
   D. The National Corresponding Secretary shall notify the transferring member, former chapter, new chapter, and their respective regions of the approved transfer.
   E. The receiving chapter’s Vice-President shall notify the transfer mother, in writing, of the chapter’s membership requirements. This notification shall include the dues structure and payment deadlines.
   F. If the transfer is within the 48 contiguous states or Alaska and there is no receiving local chapter, the transfer member becomes a National Member with potential Regional membership.
Should the transfer member elect to participate in Regional activities, she shall contact the Regional Director for payment requirements and deadlines.

G. If the transfer is out of the country, the transfer member becomes a National Member without the possibility of regional membership.

2. Financial Obligations
   Financial obligations shall be consistent with the requirements outlined in the Financial Handbook contained in the Appendix of this Manual.

3. Receiving Chapter
   A. Upon receipt of a transfer member, the new local chapter shall:
      i. Provide the transfer mother with the local handbook.
      ii. Outline, in writing, the membership requirements for the new local chapter.
      iii. Provide the transfer mother with the option for an in-person orientation to discuss local chapter organization, policies and membership requirements.
      iv. Provide the mother with contact information for the local Vice-President, who shall answer any questions the transfer member may have about membership requirements.

IV. AFFECTED PARTIES
   All Members
I. PURPOSE

The purpose of this policy is to define the process for terminating a Mother’s membership in Jack and Jill of America, Inc.

II. POLICY

1. A Mother may discontinue her membership in the Organization with a written resignation letter submitted to the local chapter Vice President.

2. A Local Chapter may terminate a Mother’s membership for reasons:
   A. Stated in their Chapter Bylaws, and/or
   B. Non-compliance with the National Constitution and Bylaws and/or other governing documents.

3. A Regional or National Officer’s membership may be terminated for non-compliance with the National Constitution and Bylaws and/or other governing documents.

III. PROCEDURE

1. A Mother whose membership is being terminated by the local chapter must be notified by the local chapter Vice-President through registered mail.
   A. The notification shall include the reasons for the termination and information regarding the member’s right to appeal.
   B. Copies of the notification shall be sent to the Regional Director, the Region’s National Officer and the National Recording Secretary.
   C. The Member shall have thirty (30) calendar days to appeal, in writing, to the local chapter executive board.
      i. If the appeal at the local chapter level is deemed unsatisfactory, the member shall have thirty (30) calendar days to appeal, in writing, to the Regional Director upon written notification of appeal results from the local Chapter Executive Board.
      ii. If the appeal at the Regional level is deemed unsatisfactory, the member shall have thirty (30) calendar days to appeal, in writing, to the National Advisory Council (NAC).
   D. The NAC shall send its decision, along with its rationale, to the member, the local chapter, and the Region by registered mail.
      i. The decision of the NAC shall be final.
E. A Mother whose membership has been terminated that decides to reapply for a new membership in the Organization must state on their application that their previous membership was terminated for cause.
   i. A Mother who fails to state their termination on any new application for membership in this Organization is subject to immediate termination due to fraud.

2. A Mother, other than a Regional Director, whose membership is being terminated due to conduct as a Regional Officer must be notified by the National Corresponding Secretary through registered mail.
   A. The notification shall include the reasons for the termination and information regarding the member’s right to appeal.
   B. Copies of the notification shall be sent to the local chapter, Regional Director, the Region’s National Officer.
   C. The Member shall have thirty (30) days to appeal, in writing, to the National Advisory Council (NAC).
   D. The NAC shall send its decision, along with its rationale, to the member, the local chapter, and the Region by registered mail. If the Regional Director is the officer in question, the next highest-ranking Regional Officer shall sit on the NAC to represent the Region.
   E. The decision of the NAC shall be final.
   F. A Mother whose membership has been terminated that decides to reapply for a new membership in the Organization must state on their application that their previous membership was terminated for cause.
      i. A Mother who fails to state their termination on any new application for membership in this Organization is subject to immediate termination due to fraud.

3. A Mother whose membership is being terminated due to conduct as a National Officer must be notified by the National Corresponding Secretary through registered mail. The Executive Director will provide this notification if the officer in question is the National Corresponding Secretary.
   A. The notification shall include the reasons for the termination and information regarding the member’s right to appeal.
   B. Copies of the notification shall be sent to the local chapter, Regional Director, the Region’s National Officer and the Executive Director.
   C. The Member shall have thirty (30) days to appeal, in writing, to the National Advisory Council (NAC).
   D. The NAC shall send its decision, along with its rationale, to the member, the local chapter, and the Region by registered mail. The National Officer in question shall not sit on the NAC while they are deliberating the appeal request.
   E. The decision of the NAC shall be final.
   F. A Mother whose membership has been terminated that decides to reapply for a new membership in the Organization must state on their application that their previous membership was terminated for cause.
i. A Mother who fails to state their termination on any new application for membership in this Organization is subject to immediate termination due to fraud.

IV. AFFECTED PARTIES

All Members
I. PURPOSE

The purpose of this policy is to clarify the membership status of a member who is granted a leave of absence.

II. POLICY

1. A member may request a written leave of absence for a limited duration as specified in the local chapter bylaws.

2. Any member who has been granted a leave of absence by the local chapter must meet all National and Regional financial obligations.

3. A member must be in good standing as defined in the *National Constitution and Bylaws*, before requesting a leave of absence. The Chapter Bylaws shall address voting strength and conditions by which a leave is granted.

4. A leave of absence prohibits the participation of the entire family unless otherwise authorized by the chapter due to extenuating circumstances (i.e. health concerns).

5. Leave of absence requests should be maintained by the Chapter.

III. PROCEDURE

1. A member in good standing may apply for a Leave of Absence by submitting a letter of request to the chapter’s Vice-President or designee.

2. The letter should be reviewed at the chapter’s executive board before submission to the membership for approval.

3. A vote during a chapter meeting is required to approve the request that is granted on an annual basis.

4. A member on leave of absence shall submit a letter requesting reinstatement.

5. A member on leave of absence is ineligible to vote or to sponsor new members.

6. A member may not graduate out while on a leave of absence.
Jack and Jill of America, Inc. – Policies and Procedures

7. A member may not participate in chapter, regional and/or national activities while on leave of absence. However, a member may participate in public events and activities sponsored by Jack and Jill of America, Inc. (i.e. open to the public) while on leave of absence.

IV. AFFECTED PARTIES

All Members
I. PURPOSE

The purpose of this policy is to define the process for obtaining membership through legacy and identify the rights and benefits under legacy status.

II. POLICY

Legacy status is granted to each child (male or female) who graduates from a chapter of Jack and Jill of America, Inc. while their mother was a member in good standing.

The female child or spouse of a male child shall be entitled to automatically become a member of the chapter in whose boundaries they reside, upon submission of an application verifying their right to legacy status.

Each legacy (male or female) shall attain membership through this process only once. If legacy status was granted to the first spouse of a male child, a subsequent spouse must seek membership through the new member intake process.

A member entering the Organization through legacy is required to fulfill the obligations of membership as outlined in the Chapter Bylaws and the organization’s National Constitution and Bylaws. Failure to comply with the obligations may result in termination. Once terminated, they may not reapply for membership under legacy status.

III. PROCEDURE

Legacy members shall submit an application for legacy membership to the National Corresponding Secretary by January 31st. Legacy status will be documented in the archives of the National Headquarters office for all members graduating in good standing. Legacy Certificates shall be provided to the graduate.

Orientation and initiation of legacy members shall take place on the same timetable as new members.

Legacy members are subject to all membership requirements as established by the local chapter and the national organization.

IV. AFFECTED PARTIES

Graduates, Spouse of a Male Graduate, Chapters
I. PURPOSE

The purpose of this policy is to define how compliance with the bylaw one in four attendance requirement is administered and measured.

II. POLICY

Effective 2008, an active member shall be required to attend one of the following activities to fulfill the one in four requirement.

1. One national convention
2. One regional mother’s conference
3. One regional teen conference
4. One regional area workday/mothers cluster

For regional activities, attendance must be in the member’s home region. Attending another region’s activities shall not count towards this requirement.

A Mother must actually register and attend the activity.

Attendance at a Children’s Cluster does not count.

Existing/Current Members

A member who graduates out by 2012 must have attended one of the four activities listed above between 2008 and her graduation date in order to graduate in good standing.

All members graduating post 2012 shall attend one of the four activities listed above every four years in order to graduate in good standing.

New Members

New Members (joining Jack and Jill of America, Inc, after the 2008 National Convention) shall attend one of the four activities listed above by their fourth year of membership.

III. PROCEDURE

1. Existing/Current Members

A member’s compliance with this policy shall be determined as of August 31st of each calendar year after all financial deadlines have passed for the
prior fiscal year and all regional and/or national conferences/conventions have been held for that year, and prior to submission of membership documentation and per capita taxes to the regional and national organization for the new program year.

2. **New Members**
   New Members will be reviewed and expected to be in compliance as of August 31st of their fourth year of membership.

3. **Responsibilities**
   The responsibility for monitoring compliance shall reside with the regions and chapters. Commencing August 31, 2011, and each August 31st thereafter, chapter administrators shall generate a report out of the MIS system of all members who have not attended one of the above listed activities since 2008. The local Vice President/Membership Chair or her designee shall send a letter notifying the member that the records reveal she is not in compliance and must attend one of the activities listed above in order to remain/graduate in good standing.

4. **Penalties**
   If a mother is determined to have not complied with this policy on August 31st, of their fourth year, the penalty imposed upon the mother shall be termination effective the new program year.

   If a mother member graduates out of the organization and she has not met the one-in four requirement:
   A. She has not graduated in good standing.
   B. Her child (ren) graduating that year is not eligible for legacy status.
   C. Her remaining child (ren) that has not graduated out will not be eligible for legacy status.

   However, any child (ren) that graduated out and at the time of their graduating out, the mother member was in good standing and in compliance with the one in four requirement said child (ren) will maintain their legacy status.

IV. **Affected Parties**
   All Members
Section 8 – Region Operations
I. PURPOSE

The purpose of this procedure is to address the management of Regions in Jack and Jill of America, Inc. to ensure consistency.

II. POLICY

1. Regions are administrative arms of the National Executive Board and as designated in the National Constitution and Bylaws shall be governed by all National governing documents.

2. A region may establish a written Regional Policies and Procedures Manual to govern regional operations between conferences.

3. Regional policies and procedures shall not be in conflict with Jack and Jill of America, Inc. governing documents.

4. The approved Regional Policies and Procedures Manual must be submitted to the appropriate National Officer (as designated by the National President) for review and compliance with Jack and Jill of America, Inc. governing documents.

III. PROCEDURES

1. The Regional Policies and Procedures Manual shall be approved by a majority vote of chapter delegates at a formal meeting or at the Regional Mothers Conference.

2. The Regional Policies and Procedures Manual shall follow an established format which shall include, but is not limited to, the following topics:
   A. Cluster Organization - There shall be a listing of the chapters assigned to each cluster in the Region.
   B. Officer Duties - There shall be a duty statement for all regional officers, including appointed officers.
   C. Regional Committees - There shall be a listing and description of all regional committees.
   D. Nominating Committee - There shall be a written process for selecting members and alternates to the nominating committee in accordance with the “Election, Nominating and Campaign Guidelines” in this Manual.
E. Finance - There shall be a section devoted to the finances of the Region in accordance with the “Financial Handbook” in this Manual. This section shall include:
   i. The amount and due dates of any regional fees approved by the delegates.
   ii. The amount and due dates of any regional late fees approved by the delegates.
   iii. The amount and requirements of any stipend provided to chapters hosting regional events.

F. Amendments – This section shall include the specific procedures and timelines for amending the Regional Policies and Procedures Manual.

IV. AFFECTED PARTIES

All Members
<table>
<thead>
<tr>
<th>Subject</th>
<th>Effective Date</th>
<th>Bylaws Reference</th>
<th>Procedure Number</th>
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<tr>
<td>Regional and Chapter Financial Disclosure Requirements</td>
<td>08/01/10</td>
<td>Article III, Section 6 B9</td>
<td>8.2</td>
<td>07/29/10</td>
</tr>
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</table>

I. PURPOSE

The purpose of this policy is to define the process that Regions and Chapters must follow in order to comply with the National Constitution and Bylaws that require full financial disclosure.

II. POLICY

All financial reporting by Regions and Chapters shall be consistent with the requirements outlined in the Financial Handbook. Should any conflicts exist with the regional or chapter financial reporting requirements and the Financial Handbook, the Financial Handbook will prevail.

III. PROCEDURE

Chapter Treasurers shall provide complete financial reports as required in the Financial Handbook at each chapter meeting. The Regional Secretary-Treasurer shall provide complete quarterly financial reports to Chapters.

1. Quarterly Reports shall include but not be limited to:
   A. Income and Expenses from:
      i. Per Capita
      ii. Cluster
      iii. Regional Conference
      iv. Teen Conference
      v. Other Meetings
      vi. Travel Expenses (travel, per diem, meals and hotel costs)
      vii. Other Expenses
   B. The last month of the quarter’s Bank Reconciliation

2. Regional Quarterly Financial reports should be signed by both the Regional Secretary-Treasurer and Regional Director.

3. Any discrepancy shall promptly be reported to the Regional Secretary-Treasurer.

4. The Regional Secretary-Treasurer shall email this letter along with the report to the Chapters and the Regional Team.

5. The timeline for submission of regional reports is as follows:
IV. AFFECTED PARTIES

Regional Secretary-Treasurer, Chapters, National Officer of the Region, Regional Director, National Executive Board

<table>
<thead>
<tr>
<th>Quarterly Reports</th>
<th>Region to Chapters</th>
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<td>October 15th</td>
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<tr>
<td>September, October, November</td>
<td>January 15th</td>
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<td>December, January, February</td>
<td>April 15th</td>
</tr>
<tr>
<td>March, April, May</td>
<td>July 15th</td>
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</tbody>
</table>
Section 9 – Chapter Operations
I. PURPOSE

The purpose of this policy is to address how chapter boundaries are established within Jack and Jill of America, Inc.

II. POLICY

The boundary of any given chapter is established during the creation of the chapter with approval from the National Executive Board (NEB). Chapter boundaries shall be described in the Chapter Bylaws.

All chapters must have current approved boundaries on file in the National Headquarters office. Changes to chapter boundaries must be approved by the National Executive Board. Chapters must adhere to their boundaries and not recruit members outside of their boundaries.

If several chapters share the same boundaries, then chapters can recruit within the shared boundaries. Chapters must have a written sharing agreement on file with the National Headquarters office in order to recruit within shared boundaries.

III. PROCEDURE

1. The NEB will review the geographic area that will be covered by the chapter being chartered and verify that there is no overlap/sharing.

2. Chapters in large metropolitan areas may share boundaries if the population of the area is in excess of 500,000 people, unless prohibited by Chapter Bylaws or NEB.

3. The National Executive Board (NEB) shall determine the boundaries of said chapters.

4. Anytime there are changes to the boundaries for a given chapter, it is the responsibility of the chapter President to provide documentation to support the change to the Region and the NEB for review and approval.

PENALTY

A chapter that does not comply with the rules governing chapter boundaries may be subject to disciplinary action up to and including termination as determined by the NEB.
IV. AFFECTED PARTIES
    Chapter Members, Regional Officers, National Executive Board.
I. PURPOSE

The purpose of this policy is to ensure the viability of new chapters. Members should refer to the Chapter Establishment Guide and New Member Handbook (in the Appendix of this Manual) for further information on requirements for new chapters.

II. POLICY

A provisional group must have a minimum of fifteen (15) members to be considered for membership.

III. PROCEDURE

1. Application
   A. Any group of mothers including legal female guardians and female custodial caretakers with children between the ages of two (2) through nineteen (19) years of age interested in the ideals and purposes of Jack and Jill of America, Inc. may request an application from the National Vice President for the establishment of a new chapter.
   B. If approved, a non-refundable application fee, determined by the National Executive Board, shall accompany all applications to the National Vice President at least twelve (12) months prior to a National Convention.
   C. Each member of a provisional group will be charged a joining fee upon their acceptance at the National Convention. This fee is due and payable at the National Convention.
   D. Members of interest and provisional groups may attend any national or regional conference as observers.

2. Sponsor
   A. The group must be sponsored by a majority vote of an existing chapter in good standing or by the National Executive Board.
   B. The sponsoring chapter, the Regional Director, and the National Officer of the Region shall assist the provisional group in following the procedures and guidelines established by Jack and Jill of America, Inc.

IV. AFFECTED PARTIES

Sponsoring Chapter, Region, National Executive Board
I. PURPOSE

The purpose of this policy is to establish a required membership level required for a chapter to maintain its status in Jack and Jill of America, Inc. The policy is designed to ensure that a chapter level of membership is sufficient to sustain participation and viability in Jack and Jill of America, Inc.

II. POLICY

1. Existing chapters with fewer than fifteen (15) members will be subject to a review of the chapter and its viability.

2. The viability of the chapter will be determined by reviewing attendance at conferences, conventions, activity in the community, ability to carry out the aims and objectives of the Organization, demographics of its location, and the chapter’s recruitment efforts.

III. PROCEDURE

The Regional Team shall review a chapter with low membership to assess the chapter’s viability. Those chapters who have less than fifteen (15) members at the time of review shall be deemed at-risk. The Regional Team shall establish written procedures to assist at-risk chapters with increasing their membership, which may include, but is not limited to financial support, training and monitoring.

The Regional and National Officers must maintain documentation to verify the chapter’s attendance at conferences and conventions.

1. At-risk chapter(s) must submit written monthly reports to the Regional Team documenting the chapter’s activities.

2. At-risk chapter(s) must submit all required written reports to the Regional Team in accordance with established dates

IV. AFFECTED PARTIES

At-Risk Chapters, Regional and National Officers
I. PURPOSE

The purpose of this policy is to provide guidance on the election and responsibilities of elected chapter officers of Jack and Jill of America, Inc.

II. POLICY

Each chapter must have but are not limited to the following officers: President, Vice-President, Program Director, Recording Secretary, Corresponding Secretary, Treasurer and Editor. Should a chapter have additional officers, it should be documented in the Chapter Bylaws.

III. PROCEDURE

1. Election of chapter officers shall be held no later than April 30th of each election year.

2. The installation of officers shall be held no later than May 31st of each election year.

3. The names of elected officers must be entered into the Membership Information System (MIS) no later than June 15th of each year.

4. All outgoing chapter officers must complete all reports due at the end of their tenure, turn over all files and records to incoming chapter officers, and hold a transition meeting no later than June 15th of each year (Except for the Treasurer, whose deadline is June 30th of each year).

DUTIES OF ELECTED CHAPTER OFFICERS

Each chapter officer must perform but is not limited to the following duties.

President

The President shall preside over chapter meetings. She shall serve as ex-officio member of all committees except the Nominating Committee. She shall have the authority to appoint special committees as necessary. She shall have the authority to call special meetings. She shall appoint the Parliamentarian. Along with the Vice President and Treasurer, she shall sign checks written on the Chapter’s bank accounts.
Vice President

The Vice-President shall, in the absence of the President, preside over chapter meetings. She shall serve as Membership Committee Chairperson. She shall coordinate the invitation to membership. She shall be a member of the Grievance Committee. Along with the President and Treasurer, she shall sign checks written on the Chapter’s bank accounts.

Recording Secretary

The Recording Secretary shall keep all chapter records (except for financial records) and maintain the official minutes for all chapter meetings. She must publish and distribute the minutes, take attendance and prepare a written attendance report to be given to the Vice-President.

Corresponding Secretary

The Corresponding Secretary shall notify all members of the meetings and chapter, regional and national activities. She shall maintain a record of all correspondence and report such to the members.

Treasurer

The Treasurer is responsible for managing all financial transactions of the Chapter. She shall write checks and keep an accurate account of all monies collected and disbursed by the Chapter. She shall provide a written report to the members at all chapter meetings and perform other duties in accordance with the Financial Handbook. She shall sign checks for the chapter along with the President and the Vice President.

Program Director

The Program Director shall assist with annual program planning and compile monthly activity reports for all age group. She shall be a member of the Grievance Committee. She shall compile a program book for the year to be given to the members and forward copies to the Regional Director and National Program Director annually by November 1st of each year.

Editor

The Editor shall submit articles for the regional newsletter, Scope and Up the Hill publications. She shall see that the community is made aware of the chapters’ events by distribution of a press release to all news media (newspaper, radio and television).
VACANCY OF OFFICE

An officer who is unable or unwilling to perform the duties of her office shall submit a written resignation to the President. Vacancies shall be filled by the Chapter President with approval of the Chapter Executive Board in accordance with the Chapter Bylaws. Vacancies shall be filled within thirty (30) calendar days of the vacancy.

IV. AFFECTED PARTIES

Chapter members
I. PURPOSE

The purpose of this policy is to address the selection of chapter appointed officers for Jack and Jill of America, Inc.

II. POLICY

The chapter President may make but is not limited to the following appointments: Foundation Chair, Parliamentarian and Protocol Chair. Chapter appointed officers shall serve no more than two terms in succession.

III. PROCEDURES

1. Within thirty (30) days of installation of the chapter President, a foundation chair, parliamentarian and protocol chair shall be appointed.

2. Duties of Chapter Appointed Officers shall be codified in Chapter Bylaws.

3. An appointed chapter officer who fails to fulfill the duties of her office shall be removed from office by the chapter President in accordance with the Chapter Bylaws.

IV. AFFECTED PARTIES

Chapter President, Chapter Appointed Officers
I. PURPOSE

The purpose of this policy is to define chapters’ responsibility in establishing and maintaining a Fathers’ Auxiliary.

II. POLICY

Chapters shall have the option of establishing a Fathers’ Auxiliary as a support group for the chapter. The male spouse of an active member within the chapter is eligible to participate in the Fathers’ Auxiliary.

III. PROCEDURE

The chapter President appoints the Fathers’ Auxiliary Chair in accordance with the Chapter Bylaws.

1. The Fathers’ Auxiliary Chair surveys the membership for possible auxiliary members.

2. Once Auxiliary members are chosen, a Fathers’ Workshop is conducted by the Regional Father’s Auxiliary Chair and the chapter President. The purpose of the workshop is to acquaint the new members with the goals and objectives of the regional and national Fathers’ Auxiliary as well as the local chapter program agenda.

IV. AFFECTED PARTIES

Chapter Presidents, Fathers
Section 10 – Program Operations
I. PURPOSE

The purpose of this policy is to establish guidelines for children’s programming (ages 12 and under).

II. POLICY

Children’s activities should include a variety of simple activities that will help them develop rapport and friendship with other children in their group. Activities should concentrate around the national theme and/or the national programmatic thrust for the year.

III. PROCEDURE

A Chapter Program Director shall assist age group chairs with planning appropriate activities that will meet the needs, interests and concerns of the children.

Mothers planning the activity should select projects, which are appealing to the group as a whole.

Mothers shall plan activities that may include other children from the community. See New Member Handbook for liability and insurance release information.

Mothers should ensure that the activities are age group appropriate.

The frequency of the children’s programming activity should be determined by chapter bylaws or planning group.

An Activity Report and Evaluation form should be completed and given to the Program Director for all children’s programming activities.

The Medical Information and Liability Release Form must be completed for all children annually. The form(s) should be collected by the Program Director and be available at every activity in case of an emergency.

Children’s programming activity at the National Convention should be centered around the national theme and/or national programmatic thrust for the year. A copy of the child (ren) Medical Information and Liability Release Form is required.

IV. AFFECTED PARTIES

Mothers, Children
Section 11 – Teens
I. PURPOSE

The purpose of this policy is to provide guidance for conducting a Regional Teen Conference in Jack and Jill of America, Inc.

II. POLICY

1. Each region shall hold an annual Teen Conference, which shall not conflict with the National Convention or Regional Mothers’ Conference.

2. A Teen whose mother, legal guardian, or custodial caretaker is an active and financial member of a local Jack and Jill of America, Inc. chapter or is a National Member with regional membership may attend the Regional Teen Conference.

3. A teen must be between the ages of thirteen (13) (by June 30th of the year of the conference year) and nineteen (19) in order to be eligible to attend the Regional Teen Conference.

4. Only registered teen members of Jack and Jill of America, Inc. are allowed to attend Regional Teen Conference.

5. Each teen is encouraged to attend Regional Teen Conference at least once during their tenure in the teen group.

III. PROCEDURE

1. Teen Conference Behavior
   A. Teen Judicial Review Board
      i. Each region shall have a Teen Judicial Review Board and a Code of Ethics at Regional Teen Conference.
      ii. The Teen Judicial Review Board shall consist of regional officers, teen officers and others as appointed by the Regional Director.
      iii. Any infraction of the Code of Ethics will result in appearing before the Teen Judicial Review Board,
iv. The Teen Judicial Review Board has authority to issue penalties for violation of Code of Ethics or any Jack and Jill of America, Inc. governing documents up to and including dismissal of the offending teen(s) from the conference. Parents of the offending teen shall be duly informed of the infraction, preferably by telephone. Each infraction and decision shall be discussed and approved by the Regional Director.

2. Code of Ethics
   Each sponsor/chaperone is responsible for making their teens aware of the Code of Ethics for the Regional Teen Conference. Parents that have a participating teen(s) should receive a copy of the Code of Ethics.

   A teen Code of Ethics shall be enacted in each region and shall include.
   A. A mandatory 1:00 a.m. curfew, except Saturday night, which shall have a mandatory 1:30a.m. curfew
   B. Adequate adult chaperones at all functions
   C. No alcohol or other drugs
   D. No post-curfew parties
   E. Each teen must respect all sponsors, chaperones, adults, and regional officers regardless of chapter affiliation

3. Attendance at Workshops and Plenary Sessions
   Registered conference attendees must attend all meetings and plenary sessions.
   A. The plenary sessions shall be held at the times determined and scheduled by the Regional Director, the Teen Officers and the mothers of the host chapter.
   B. Only registered attendees may attend conference sessions and activities.
   C. There shall be one (1) sponsor/chaperone per five (5) teens to assist with all activities at the conference at all times.
   D. No teen may leave the conference premises unless for a scheduled teen conference activity and must be accompanied by a registered teen sponsor/chaperone.
   E. All registered attendees must wear their registration badge at all times except for the formal banquet at which time a ticket must be presented in order to attend.
   F. Dress Code: No short-shorts, halter-tops, cut-off jeans, midriff shirts, see through clothing, micro miniskirts/dresses, or “do-rags” will be allowed. The attire required for all plenary sessions is business attire. Male teens are required to wear dress shirts, ties and slacks. Female teens are required to wear dresses, pant suits or a skirt and blouse.

IV. AFFECTED PARTIES
   Teens, Sponsors, Chaperones, Regional Officers
I. PURPOSE

The purpose of this policy is to identify the governing document for teen activities in Jack and Jill of America, Inc.

II. POLICY

Teen activities in Jack and Jill of America, Inc. shall be governed by Teen Regional Bylaws. Said bylaws shall not conflict with any other governing documents of Jack and Jill of America, Inc.

Teen Regional Bylaws are to be presented and amended, if necessary, at Regional Teen Conference. Any amendments coming from Regional Teen Conference must be approved by the delegates in attendance at the Mother’s Regional Conference before amendments can be submitted to National for consideration.

III. PROCEDURE

Any teen may submit a proposed amendment to the Teen Bylaws Committee at Regional Teen Conference.

Proposed bylaw amendments require a two thirds (2/3) vote of the teen delegates present at Regional Teen Conference.

Should the bylaw amendment pass, the amendment is then submitted for approval at the next Mother’s Regional Conference.

IV. AFFECTED PARTIES

Teens, Regions
I. PURPOSE

The purpose of this policy is to identify and define regional teen elected officers and their roles.

II. POLICY

Regional teen officers shall be elected in accordance with the election process as outlined in this Manual. The teen elected officers include the President, Vice-President, Secretary, Treasurer and Foundation Chair.

III. PROCEDURE

The duties of Teen officers are defined as follows:

1. President
   A. Shall preside over meetings; serve as ex-officio member of all committees except the Nominating Committee.
   B. Shall recommend candidates for: parliamentarian, chaplain, sergeant-at-arms and other officers/committee members as appropriate.
   C. Shall work with the Regional Team and host chapter in planning Regional Teen Conference.
   D. Shall attend the National Convention as a representative of the Region, to serve as a page.

2. Vice-President
   A. Shall preside over meetings, in the absence of the President.
   B. Shall assist the President.
   C. Shall perform duties as designated by the Region's Standing Rules.

3. Secretary
   A. Shall conduct the roll call at each plenary session to include:
      i. Seating of the delegates
      ii. Recording chapters who are tardy and absent.
   B. Shall keep records of the business sessions of Teen Regional meetings.
      i. Shall record all votes and compile all committee reports for inclusion in the minutes.
      ii. Shall see that all correspondence authorized by Regional Director and Teen President is sent.
C. Shall submit minutes to the Regional Secretary-Treasurer no later than December 31st unless the services of a professional stenographer have been contracted.

4. Treasurer
   A. Shall serve as chair of the Regional Teen Budget Committee and work under the supervision of the Regional Secretary-Treasurer.
   B. Shall keep accurate account of all income and expenditures and submit a copy at the Regional Teen Conference.
   C. Shall record and report the teen chapters' contributions to Jack and Jill of America Foundation, Inc.

5. Teen Foundation Chair
   A. Shall disseminate information on the Jack and Jill of America Foundation, Inc. to regional teens.
   B. Shall represent the interest of regional teens as they relate to the Jack and Jill of America Foundation, Inc.
   C. Shall encourage and support fundraising efforts and grant submissions by chapter teen groups.
   D. Shall work under the direct supervision of the Regional Foundation Member-At-Large (MAL).
   E. Shall serve as chair of the Regional Teen Foundation Committee.
   F. Shall serve as the regional teen representative on the Jack and Jill of America Foundation Advisory Committee.
   G. Shall assist with planning and implementing the Regional Teen Conference Service Project(s).

IV. AFFECTED PARTIES
    Regional Team, Regional Teen Officers
I. PURPOSE

The purpose of this policy is to define the qualifications and eligibility requirements for appointed teen officers.

II. POLICY

In order to be eligible for appointment to a regional teen office, a candidate must:

1. Have been active in Jack and Jill of America, Inc. for at least one (1) full calendar year prior to the appointment
2. Be able to complete a possible second year in office before reaching age twenty (20)
3. Remain active, both in the appointed position and also in their local chapter, during the tenure of their appointment. Active is defined as attending a majority of the meetings and participating in a majority of the local chapter teen activities.

If an appointed teen officer fails to remain active in their appointment and/or in their local chapter, the teen officer is subject to removal from office.

III. PROCEDURE

The Regional Director shall appoint teens to serve as Appointed Teen Officers.

IV. AFFECTED PARTIES

Regional Director, Teens
Section 12 – Associates
I. PURPOSE

The purpose of this policy is to define associate membership and outline their responsibilities.

II. POLICY

1. A mother may become an associate member of the organization if she is a member in good standing when either her youngest child completes high school or when the youngest child reaches age twenty (20).

2. Upon the death of an only child or the youngest child of a member in good standing, a member may continue her affiliation with the organization as an associate member.

3. An associate member may choose to affiliate with an associate group of a nearby chapter, if her chapter does not have an associate group.

4. If the chapter or its associate group dissolves, the associate member is entitled to transfer her membership to a nearby chapter’s associate group or become a National Life Member.

5. Each chapter shall have an associate liaison to help recruit tenured mothers and disseminate information to the associate group. The chapter’s associate group may fall under the responsibilities of the Vice-President.

6. An associate member may attend national, regional and chapter meetings as a non-voting member, but cannot be elected to an office or chair a local, regional or national committee other than the Associate Committee.

7. At each National Convention, the National President, with the approval of the National Executive Board, will appoint the National Associate Chair from the pool of regional associate chairs in accordance with the alphabetical rotation of regions.

III. PROCEDURE

1. The chapter associate group must operate under the charter of the local chapter, it cannot operate as a separate entity.
The chapter associate group cannot have its own checking account nor conduct its own fundraisers. An associate group can be involved in the chapter’s fundraising efforts.

2. An associate group cannot sign contracts in the name of Jack and Jill of America, Inc. The local chapter’s President and Treasurer must sign all contracts.

3. All funds received by an associate group, (i.e. dues, fundraiser tickets, anniversary celebrations, etc.) must be submitted to the local chapter for deposit in the Chapter checking account.

IV. AFFECTED PARTIES

Chapters, Associate Groups, Associates
I. PURPOSE

The purpose of this policy is to define the tenure, financial requirements, benefits and responsibilities of Life Membership.

II. POLICY

Any mother, female legal guardian, or female custodial caretaker who has been an active member for at least ten (10) years, and has completed her tenure in good standing, and has reached Associate status may apply for Life Membership.

This minimum ten (10) year service requirement can be satisfied by either membership as an active member in a Chapter or by membership in a chapter of less than ten (10) years combined with membership as an Associate Member.

1. Mothers with ten (10) years of membership shall pay a one (1) time Life Membership fee of $450.

2. Mothers with fifteen (15) years of membership shall pay a one (1) time Life Membership fee of $350.

3. Mothers with twenty (20) years of membership shall pay a one (1) time Life Membership fee of $250.

4. Past National Presidents are entitled to free Life Membership.

Life Member Benefits and Responsibilities

1. Life Members may, but are not required to, attend chapter meetings, regional conferences or national conventions as non-voting members.

2. Life Members who attend national conventions, regional conferences and area workday/mothers’ workday cluster meetings will receive a reduction on conference and convention registration fees.

3. Past National Presidents shall be entitled to life membership upon completion of their term of office; this designation waives conference fees, lodging and travel expenses for future national conventions. A former National President

<table>
<thead>
<tr>
<th>Subject</th>
<th>Effective Date</th>
<th>Bylaws Reference</th>
<th>Procedure Number</th>
<th>Approval Date</th>
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<tbody>
<tr>
<td>Life Membership</td>
<td>08/01/10</td>
<td>Article I, section 1 D</td>
<td>12.2</td>
<td>07/29/10</td>
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</table>
who remains an active member upon completion of her term in office must meet active member obligations of her local chapter.

4. Life Members will be entitled to the following privileges: reduced registration fees, reserved seating, a gold life pin, life membership certificate and card, and inclusion on the mailing list for national publications.

III. PROCEDURE

All life membership fees shall be paid through the local chapter. Chapters should forward one (1) lump sum for all life membership fees by chapter check to the National Treasurer no later than September 30th.

1. A Life Member, who is not a past National President, attending a Mothers’ Workday Cluster, Regional Conference, or National Convention, must submit all registration documents and monies to the local chapter. The local chapter should ensure that the Life Member is properly registered.

2. A past National President attending a Mothers’ Workday Cluster or a Regional Conference, must submit all registration documents to the Regional Director or designee. The Regional Director or designee should ensure that the past National President is properly registered. Lodging and travel arrangements/expenses should be covered by the Region.

3. A past National President, attending a National Convention, should submit all registration documents to the Registration Committee. Registration, lodging and travel arrangements/expenses should be covered by the National Convention Budget.

IV. AFFECTED PARTIES

Life Members, Past National Presidents
**Associate Mothers Away from Home Project –**

The Mothers Away from Home Project is the premiere program of The Associates of Jack and Jill of America, Incorporated. This program is designed to provide a “network” of contacts by which Jack and Jill College and boarding school students may be assisted in their transition and existence in their new environment. The MAFH Project is administered through local Jack and Jill chapter Associates Groups across the country. The major thrust is to continue to perpetuate the aims and objectives of the organization through educational, cultural, civic, recreational and social activities.

The program is open to all consenting mothers and students who meet the following criteria:

- Active Mother
- Associate Mother
- Mother who has completed tenure in good standing

**Enrollment Procedure:**

- MAFH Student registration form must be completed and submitted to the National Office
- Enrollment is available at anytime
- Full instructions and forms may be located on the Jack and Jill website by clicking on the Associates link, then select procedures to enroll in the MAFH Project
- Chapters are encouraged to keep logs of outreach activities provided to college students.
- Chapters should make contact with the collegiate through the months of November through April.

**Required Forms:**

- MAFH Student Registration Form
- MAFH Chapter Assignment Form
- MAFH Activity Log

**Suggested Activities:**

1. Send school supplies
2. Box of goodies for room
3. Telephone call
4. Invite to lunch or dinner
5. Holiday memoirs
6. Send cards (birthday, holidays, etc.)
7. Personal items
8. Invite collegiate to speak to teens
9. Off-campus activities
10. Travel assistance
Section 13 – Glossary
# GLOSSARY

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Participates in the required activities of Jack and Jill of America, Inc.</td>
</tr>
<tr>
<td>Appointed Officer</td>
<td>Appointed by National, Regional or Chapter Leader</td>
</tr>
<tr>
<td>Business Day</td>
<td>Monday – Friday, excludes weekends</td>
</tr>
<tr>
<td>Calendar Day</td>
<td>Sunday – Saturday</td>
</tr>
<tr>
<td>Chapter Executive Board</td>
<td>Consists of Chapter Elected and Appointed Officers</td>
</tr>
<tr>
<td>Elected Officer</td>
<td>Elected by the National, Regional or Chapter Body by vote</td>
</tr>
<tr>
<td>Fine</td>
<td>Fee assessed for infraction of Jack and Jill of America Governing documents</td>
</tr>
<tr>
<td>Financial</td>
<td>Current with required Jack and Jill of America, Inc. dues, fees and assessment</td>
</tr>
<tr>
<td>Good Standing</td>
<td>Active and Financial. Compliant with Jack and Jill of America, Inc. rules, regulations and processes.</td>
</tr>
</tbody>
</table>
Section 14 – Appendices

The following is a list of supporting documents that are included in the governance policy and hereto presented as part of this manual, not shown however referenced. All documents can be accessed electronically at the following website: [www.jack-and-jill.org](http://www.jack-and-jill.org).

Campaign and Election Guidelines

Chapter Bylaws

Chapter Establishment Guidelines

Charter (Articles of Incorporation)

Code of Ethics

Financial Handbook

Grievance Procedures

Member Manual

National Constitution and Bylaws

New Member Orientation Guidelines

Nominating Rules and Regulations

Robert Rules of Order