



FBI/IA-OP/BA

**Wisconsin**

Phi Beta Lambda

**Chapter Handbook**

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# Wisconsin PBL Chapter History

During the early years of its history, Wisconsin FBLA and PBL functioned as a single group. Both levels of the organization were represented on one executive board, and all conferences and meetings were held jointly. This relationship continued until the Fourteenth Annual State Leadership Conference of Wisconsin Future Business Leaders of America and Phi Beta Lambda held in 1967 at Green Lake. At this time, members voted to separate the two organizations and the Wisconsin Chapter of Phi Beta Lambda was formed.

At the time of this change, PBL had active chapters at Madison Business College, UW-Eau Claire, UW-Stevens Point, UW-Superior, and UW-Whitewater.

The following persons have served as president of the Wisconsin PBL State Chapter:

<b>Year</b>	<b>President</b>	<b>School</b>
1967-68	Mike White	UW-Eau Claire
1968-69	Steve Hagen	UW-Superior
1969-70	Gerald Rickman	UW-Stevens Point
1970-71	Andy Stenklyft	UW-Whitewater
1971-72	Krisan Jug	UW-Eau Claire
1972-73	Richard Ihlenfeldt	Madison Business College
1973-74	Robert Brandt	UW-Whitewater
1974-75	Kaye Holsenbach	UW-Stevens Point
1975-76	Kathy Walker	UW-Eau Claire
1976-77	Deb Pagel	UW-Whitewater
1977-78	Chris Ott	UW-Eau Claire
1978-79	Frank Wood	UW-Whitewater
1979-80	Brian Johnson	UW-Eau Claire
1980-81	Jill Spruill	UW-Whitewater
1981-82	Penny Pease	UW-Superior
1982-83	Cindy Krueger	UW-Eau Claire
1983-84	Doug Henderson	UW-Eau Claire
1984-85	Jeff Johnson	UW-Eau Claire
1985-86	Lori Minot	UW-Whitewater
1986-87	Lisa Frye	UW-Eau Claire
1987-88	Mike Lieske	UW-Whitewater
1988-89	Laurie Hanson	UW-Eau Claire
1989-90	Kathy Luckow	UW-Whitewater
1990-91	Ami Patel	UW-Madison
1991-92	Dan Reed	UW-Eau Claire

1992-93	Jo Ann Lynch	UW-Superior
1993-94	Jeff Koenig	UW-Eau Claire
1994-95	Krista Klas	UW-Whitewater
1995-96	Dale Rait	UW-Whitewater
1996-97	Amanda Ashcraft	UW-Eau Claire
1997-98	Michelle Ekstrand	UW-Whitewater
1998-99	John Piercy	UW-Eau Claire
1999-00	Steve Wills	UW-Whitewater
2000-01	Josh Firgens	UW-Whitewater
2001-02	Heather Lindner/Nikki Lindner	UW-Eau Claire
2002-03	Jo Ann Burkholder	UW-Whitewater
2003-04	Patrick Murphy	UW-Madison
2004-05	Jacob Schultz	UW-Platteville
2005-06	Doralee Coehoorn	UW-Whitewater

# Wisconsin PBL Goals

## I. Membership

- A. Achieve a net increase of 10 percent in Wisconsin PBL Membership annually.
- B. Reactivate or establish one Phi Beta Lambda chapter annually
- C. Actively recruit additional Professional Division members

## II. Communication

- A. Communicate with local chapters at least once every month
  - 1. By the 10<sup>th</sup> of the month
  - 2. By print, telephone, or email
  - 3. President-all chapters
  - 4. Vice President-newest chapter or most recent reactivated chapter
  - 5. Secretary-designated chapter
  - 6. Reporter-designated chapter
  - 7. Parliamentarian-designated chapter
- B. Publish four issues of the *Wisconsinite*. Three online in October, January, and after SLC. One printed issue for distribution at SLC.
- C. Communicate with the Wisconsin Phi Beta Lambda Advisory Council at least once each semester
  - 1. Encourage Council member to read the online *Wisconsinite*
  - 2. Encourage Council support/participation in the State Leadership Conference
- D. Invite Advisory Council members to the planning sessions
  - 1. Invite chapters to appoint additional Advisory Council members
  - 2. Invite Advisory Council members to judge competitive events at SLC
  - 3. Send updates to Council members on what Wisconsin PBL is doing

## III. Divisional Support

- A. Communicate with the FBLA State Executive Board at least three times during the year
  - I. Send the printed issue of the *Wisconsinite* and introduce them to the online editions
  - II. Ongoing communication with FBLA Awareness Chair
  - III. Offer assistance with Regional and State Conferences

#### **IV. Awareness and Visibility**

- A. Distribute Wisconsin Phi Beta Lambda information brochures at FBLA events
- B. Assist in the Wisconsin FBLA Regional and State Conferences
  - 1. Present a workshop
  - 2. Have a PBL booth available for interested FBLA members
  - 3. Offer to help judge competitions

#### **V. Special Projects**

- A. Have at least two state community service projects
- B. Encourage local chapters to work with National Literacy Campaign piloted in 1995—all state officers with their assigned chapter
- C. Solicit Adopt-A-Plaque contributions to help cover costs of SLC—mailing to potential donors by January 1 before SLC
- D. Work with FBLA on at least one combined activity during the school year— all state officers with their assigned chapter

# Fiscal Policy

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## State Adviser Reimbursement

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The State Adviser will receive a reimbursement of \$500 at the end of the PBL year. This is a token of appreciation for the adviser's help throughout the year as well as to help defray expenses for:

- travel to represent Wisconsin Phi Beta Lambda.
- state, regional, and national leadership conference costs.

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## State Officer Reimbursement

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The state officers will receive \$50 for expense reimbursement. Although this amount may not meet actual expenses incurred as an officer, it represents a token of appreciation for the officers' contributions to the success of the state chapter.

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## Expenditures for Conferences and/or State Projects

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All major expenditures for conferences and other state projects must be approved by a majority vote of the State Executive Board before reimbursement will be made.

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## State Officer Travel

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The members of the State Executive Board will travel to local chapters when invited; however, the local chapter extending the invitation should reimburse the officer for their expenses.

Schools who are planning to activate or reactivate a Phi Beta Lambda chapter will not be expected to pay officer expense. Representatives from the nearest PBL chapter and/or a state officer will make these presentations.

Officers who travel to regional FBLA conferences to judge contests, present a workshop, or publicize PBL will receive a token \$20 for travel expenses.

# Duties of Wisconsin PBL Division Chairs

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## Professional Division

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Work with Professional Division (PD) to recruit graduated PBL members and business persons to become active members of the PD of FBLA-PBL, Inc. Communicate with current PD members and encourage their participation in Wisconsin PBL conferences. Promote the use of gift PD memberships by local chapters. Work with members of the Wisconsin PBL Advisory Council.

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## Community Service Division

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Organize two state community service projects. These would be done for partnership organizations such as In Praise of Age, March of Dimes, or Tourette Syndrome. Alternative projects may be considered such as service to state parks. Coordinate state service projects with local chapter community service chairs.

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## FBLA Awareness Division

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Communicate with the FBLA State Executive Board members. Plan workshops for FBLA Regional and State Conferences. Keep FBLA chapters informed of PBL activities and encourage their participation. Inform Wisconsin Regional FBLA Presidents of Wisconsin PBL chapters within their region that may be of service to them. Establish contact early in the fall and maintain it throughout the year. Compile a list of graduating seniors and where they will be attending college for use the following year in membership and chapter recruitment or reactivation. Assist with the development, promotion, and administration of the Wisconsin FBLA scholarship.

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## Hall of Fame Division

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Inform each chapter of the opportunity to choose a Hall of Fame inductee from their chapter. Coordinate the Hall of Fame recognition and reception at the SLC and update the Hall of Fame Scrapbook.

# Wisconsin PBL Projects

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## Spirit Award

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The Wisconsin Spirit Award was established to encourage the involvement of local chapters in activities endorsed and promoted at the state and national levels. A point system is used to determine the local chapter who will receive the Wisconsin Spirit Award traveling trophy awarded at the Spring Leadership Conference. A copy of the Wisconsin Spirit Award Guidelines is included in Appendix A.

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## Wisconsin PBL Scholarship

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Wisconsin Phi Beta Lambda offers a \$100 scholarship and a \$50 scholarship each year to active members of Wisconsin Phi Beta Lambda. The scholarships are based on their involvement and participation in PBL. A copy of the scholarship application is included in Appendix D. Copies are also available through Wisconsin PBL Executive Board members.

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## Lorraine Missling Scholarship

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The Dr. Lorraine Missling Scholarship was initiated in 1984 by Wisconsin Phi Beta Lambda and Dr. Missling. A \$100 scholarship is awarded to a PBL member who is a Business Education or business major of junior standing in a degree granting college or university with at least one year remaining in his/her program. Applications are distributed by a member of the Wisconsin PBL Executive Board. Completed applications are due **January 1** of each year. A copy of the Lorraine Missling Scholarship Criteria and Application form is included in Appendix B.

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## Wisconsin PBL Hall of Fame

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The Wisconsin PBL Hall of Fame was established in 1987 to recognize outstanding PBL alumni for their contribution to the organization. Each active chapter shall select one former PBL member—who has been out of school for at least two years—from their organization to be placed in the Hall of Fame. The Hall of Fame will be on display at the Spring Leadership Conference. A copy of the Wisconsin PBL Hall of Fame Guidelines and Registration form is included in Appendix C.

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### **Project H.E.L.P.**

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Wisconsin Phi Beta Lambda encourages each local chapter to conduct a fund raiser, such as a bowl-a-thon, WalkAmerica, etc., for the March of Dimes Foundation to help fight birth defects. Source: March of Dimes Birth Defects Foundation, 1275 Mamaroneck Avenue, White Plains, NY 10605, Telephone 914-997-4465.

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### **Tourette Syndrome Awareness**

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Wisconsin Phi Beta Lambda encourages each local chapter to support the Tourette Syndrome Awareness partnership by conducting awareness programs in their community. Information Source: TS Association, Inc., 42-140 Bell Boulevard, Bayside, NY 11361-2861; Telephone 718-224-2999.

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### **FBLA Scholarship**

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Wisconsin Phi Beta Lambda encourages FBLA students graduating from high school to attend a Wisconsin school with a Phi Beta Lambda chapter. The student selected will be given a \$100 scholarship if they join the Phi Beta Lambda chapter during the Fall semester at the school they attend.

# Wisconsin PBL Publications

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## ***The Wisconsinite***

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The *Wisconsinite* is published by the state reporter (goal is to have at least three issues—one in the fall to inform about annual activities; one before the Spring LC to promote contests; and one after the SLC to announce winners and promote the NLC). The themes, deadlines, and number of issues are established by the state reporter and approved by the Executive Board at the summer planning meeting.

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## **State Chapter Annual Business Report**

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At the end of the year, the state vice president prepares an annual business report. This report describes chapter activities throughout the PBL year. The report should be submitted for competition to the National Office before the published deadline.

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## **Wisconsin PBL Brochure**

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This brochure describes the Wisconsin Chapter of Phi Beta Lambda. Copies can be obtained from the Wisconsin State Reporter or the State Adviser. A camera-ready copy for promoting PBL on your campus is included in Appendix E. A color disk can be obtained from the state adviser.

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## **Wisconsin FBLA Brochure**

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This brochure is designed for FBLA students who might attend a college where there is a PBL chapter. It should be distributed whenever members speak to FBLA groups or attend FBLA events. Copies can be obtained from the Wisconsin FBLA Awareness Committee Chair or the State Adviser.

# Wisconsin PBL Meetings/Conferences

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## Summer Planning Meeting

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This meeting, normally held in June, is the planning meeting for the new officers, delegates-at-large, and committee chairs. The old officer team members and PD members are invited to attend to share ideas and information gained during their year(s) in office and PBL. During this meeting plans are made for the next school year.

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## Fall Leadership Conference

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Executive Board members plan a fall conference to bring the chapters together for leadership training, workshops, and social activities. The FLC should be planned at the Summer Planning Meeting and responsibilities assigned at that time.

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## Winter Executive Board Meeting

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This meeting is usually held at the end of January and is the second Executive Board meeting of the school year; the first is held at the Fall Leadership Conference. The meeting includes officer and committee reports, unfinished business, new business, and announcements.

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## Spring State Leadership Conference

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This conference is the highlight of the Wisconsin Phi Beta Lambda year. Participants compete for the honor of representing Wisconsin at the National Leadership Conference. Other highlights include: banquet, plaques for first place winners in each event, luncheon, workshops, battle of chapters, and a state slide show.

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## National Fall Leadership Conferences (NFLC)

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These conferences are held at various locations around the nation and allow members to share ideas and reaffirm common goals while participating in professional development and career opportunity workshops. Participants gain a better understanding of the organization at the national level.

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## **National Leadership Conference (NLC)**

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The NLC concludes the year's activities and sets the stage for the upcoming year. Members participate in business-related and leadership development workshops, tour business and corporate facilities, elect national officers, and participate in national competitive events.

# Running for State or National Office

All local chapters are encouraged to run candidates for a state or national office. Each candidate must be an active PBL member and must have at least one year remaining in his/her degree program. Campaigns should be appropriate; candidates are limited to one poster to be hung and one flyer to be distributed to attendees. Favors are not permitted at the state level, but are allowed at the national level.

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## State Office

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The chapter that has the current State President may not run a candidate for that office the following year unless there are fewer than four local chapters with dues paid by the Winter Planning Session.

Applications, which include a one- to two-page resume stressing PBL involvement and a one-page list of platform goals, must be mailed to the State Adviser by the deadline for SLC registration. All candidates are then *required* to register for the SLC prior to the deadline for registrations and attend the officer screening session prior to the beginning of the SLC.

Approved candidates for the offices of vice president, secretary, and reporter will be allotted four minutes (including campaign manager's time) for their campaign speech to be given at the first general session of the Spring Leadership Conference. Candidates for state president will be allotted six minutes total time.

Voting by the voting delegates, by secret ballot, will occur at the second general session and those candidates receiving a majority vote shall be elected to state office.

High score on the written Parliamentary Procedures Test given during the SLC determines the State Parliamentarian.

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## National Office

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Any member desiring nomination for a national office should submit a data sheet and platform for office to the State Adviser by the deadline for SLC registration. All candidates are then *required* to register for the SLC prior to the deadline for registrations and attend the officer screening session prior to the beginning of the SLC. National officer candidates must meet the national guidelines for the office they would seek if selected as Wisconsin's candidate.

Those students will be allowed to campaign at the Friday night session along with the students running for state office. Candidates for national office will be allotted six minutes total time.

Voting by the voting delegates, by secret ballot, will occur at the second general session and the candidate receiving a majority vote shall be the Wisconsin candidate for national office.

# Competitive Events

Refer to the current National PBL Chapter Handbook for a description of the competitive events listed below. The National office may add new events as new technologies or business programs are developed.

# Format Guide

Wisconsin Phi Beta Lambda follows the National Phi Beta Lambda Handbook Guide for formatting documents. Visit the National Phi Beta Lambda website for an up to date version

# Wisconsin PBL Chapters

<b>Number</b>	<b>Name</b>	<b>Status</b>
7786	Bryant Stratton College—Milwaukee	Inactive
14911	Herzing College-Madison	Active
1441	Marian College—Fond du Lac	Inactive
9998	Mount Senario College—Ladysmith	Inactive
8348	Mount Mary College—Milwaukee	Inactive
10116	St. Norbert College—Milwaukee	Inactive
2574	UW—Eau Claire	Active
12852	UW—Green Bay	Inactive
8463	UW—Madison	Active
	UW-Oshkosh	Active
14656	UW-Platteville	Active
3979	UW—Stevens Point	Inactive
3259	UW—Superior	Active
1522	UW—Whitewater	Active
14521	Wisconsin Lutheran College	Inactive

# Wisconsin PBL Hall of Fame Inductees

<b>Name</b>	<b>Chapter</b>	<b>Year</b>
Shirley Dohman	UW-Whitewater	1987
Brian P. Johnson	UW-Eau Claire	1987
Bill Lisowski	UW-Eau Claire	1987
Lorraine Missling	UW-Eau Claire	1987
Jill Spruill Richardson	UW-Whitewater	1987
Sally Schwartz Schoenike	UW-Whitewater	1987
Andy Stenklyft	UW-Whitewater	1987
Michael White	UW-Eau Claire	1987
Donal K. Zahn	UW-Whitewater	1987
Mary Margaret Hosler	UW-Whitewater	1988
Cindy Dahl	UW-Whitewater	1989
Cinday Jansen	UW-Eau Claire	1989
Jack Hoggatt	UW-Eau Claire	1990
Virginia Olson O'Brien	UW-Whitewater	1990
Nan Olson	UW-Superior	1990
Lynne Billmeyer Hogan	UW-Eau Claire	1991
Lori Minot	UW-Whitewater	1991
Deb Kunert	UW-Eau Claire	1992
Mike Lieske	UW-Whitewater	1992
Daryl Braatz	UW-Eau Claire	1993
Kathy Luckow Reed	UW-Whitewater	1993
Cathy Miller	UW-Whitewater	1994
Cindy Hofacker	UW-Eau Claire	1995
Connie Schmidt La See	UW-Whitewater	1995
Dan Reed	UW-Eau Claire	1996
Diane Weinheiver	UW-Whitewater	1996
Krista Klas	UW-Whitewater	1998

# Constitution, Bylaws, and Standing Rules

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## Article I. Name

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The name of this chapter of FBLA-PBL, Inc., shall be Wisconsin Phi Beta Lambda and may be referred to as Wisconsin PBL.

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## Article II. Purpose

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**Section 1.** The purpose of Wisconsin PBL is to provide opportunities for post-secondary and college students to develop vocational competencies for business and office occupations and business teacher education. Wisconsin PBL is an integral part of the instructional program and, in addition, promotes a sense of civic and personal responsibility.

**Section 2.** The specific goals of Wisconsin PBL are to:

- Develop competent, aggressive business leadership
- Strengthen the confidence of students in themselves and their work
- Create more interest in an understanding of American business enterprise
- Encourage members in the development of individual projects which contribute to the improvement of home, business, and community
- Develop character, prepare for useful citizenship, and foster patriotism
- Encourage and practice efficient money management
- Encourage scholarship and promote school loyalty
- Assist students in the establishment of occupational goals
- Facilitate the transition from school to work

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## Article III. Membership

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**Section 1.** Wisconsin PBL membership shall consist of members of chartered local chapters. These members shall hold membership in their state and national chapters. Individual members shall be recognized only through the state chapter of PBL.

**Section 2.** The Wisconsin PBL Chapter, as well as its local chapters, shall be open for membership to the following classes of members.

*Active Members* shall be students enrolled in business and/or business related fields who accept the purpose of Wisconsin PBL and subscribe to its creed. Active members shall pay dues as established by Wisconsin PBL and may participate in state events, serve as voting delegates at the Spring State Leadership Conference, hold state office, and otherwise represent Wisconsin PBL as approved by the State Executive Board and their local advisers.

*Professional Members* shall be persons associated with or participating in the professional development of Wisconsin PBL as approved by the State Executive Board. Such members include local and state chapter advisers, business teachers, business teacher educators, state supervisors of business and office education, employers or supervisors of cooperative work-training students, advisory council members, business persons, and other persons contributing to the growth and development of Wisconsin PBL but shall not participate in events, serve as voting delegates, or hold office.

*Honorary Life Members* may be elected to the state of Wisconsin or a local chapter by a majority vote. They shall be persons who are assisting in the advancement of business and office education and/or who are rendering outstanding service to Wisconsin PBL. Honorary life members shall not vote or hold office and shall not be required to pay dues.

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## **Article IV. Dues and Finance**

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**Section 1.** State dues based on the recommendations by the State Executive Board and State Adviser shall be determined by a majority vote of the local voting delegates at the Spring State Leadership Conference. State and National dues of members shall be forwarded directly to the PBL National Office. In order to compete at Nationals, State and National dues of members must be received by the national office enforced deadline.

**Section 2.** Annual dues shall be \$7.

**Section 3.** The State Adviser and State Treasurer (if appointed) shall administer all Wisconsin PBL finances to include the privileges of the tax exempt number (ES20460, March 3, 1980), submit an annual financial statement to the national office, and provide for an audit at the discretion of the Executive Board.

**Section 4.** The fiscal year of PBL shall be July 1 through June 30.

**Section 5.** Any and all returned checks are subject to a \$25 fee plus applicable bank fees at the discretion of the Treasurer or Adviser.

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## **Article V. Organization**

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**Section 1.** Wisconsin PBL shall be an association of Wisconsin local chapters, each operating in accordance with a charter granted by FBLA-PBL, Inc. only local chapters that have received charters, Greek names, and numbers issued by FBLA-PBL, Inc., and that are currently in good standing shall be referred to as chapters of Wisconsin Phi Beta Lambda or PBL.

**Section 2.** The administration of Wisconsin PBL shall be vested in the State Chairman who will be appointed by the national FBLA-PBL, Inc. Board of Directors and the State Adviser who will be appointed by the State Chairman.

**Section 3.** There shall be a State Executive Board that shall make recommendations to the Wisconsin PBL Chapter and perform duties as prescribed in the Constitution and the Bylaws.

**Section 4.** Local chapter charters shall be issued upon the approval of the State and National Boards. Wisconsin PBL will hold an annual meeting to elect state officers and conduct business to qualify for a state chapter charter. The state chapter shall have a state committee composed of professional educators in the areas of business and office occupations.

**Section 5.** Each local chapter shall have an adviser who shall be a faculty member or an area businessperson. A local chapter may have as many special-emphasis groups under the chapter charter as it deems necessary to meet the interests of all the students. The local chapter of PBL shall assume full responsibility for coordinating the program for these interest groups.

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## **Article VI. Officers and Elections**

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**Section 1.** State Officers. The elected officers of Wisconsin PBL shall be President, Vice President, Secretary, Reporter, and Website Coordinator. The appointed officers shall be Parliamentarian and, optionally, Treasurer.

**Section 2.** Term of Office. All officers shall serve without salary. The elective offices shall be filled by elections held during the annual Spring State Leadership Conference. All officers shall serve for a term of one year commencing at the end of the Spring State Leadership Conference. However, at the National Leadership Conference, the officers of the previous year will represent Wisconsin. Because of severe misconduct or neglect of duties, an officer may be forced to leave

office by unanimous consent of all other officers, subject to the approval of the State Adviser.

**Section 3.** Election Proceedings. Each local chapter shall be entitled to run one candidate for each office. Campaigning will commence with the opening of the Spring State Leadership Conference. Officers shall be elected by a majority vote of the voting delegates. If no candidate for an office receives a majority vote on the third ballot, the candidate receiving the lowest number of votes for that ballot shall be dropped from the ballot. If necessary, the candidate receiving the lowest number of votes shall be dropped from each subsequent ballot until one candidate receives a majority. If only two candidates remain and they are tied, the ballot will be retaken. Each chapter will be entitled to one vote. A majority of chapters shall be necessary for election. If a tie remains, it will be broken by a random method determined by the state adviser. In the event there is only one candidate for an office, the candidate may be elected by a standing vote. Each local chapter may hold more than one elected officers' position. If a student Treasurer is not desirable, the State Adviser shall serve as Treasurer for the fiscal year.

**Section 4.** Qualifications for State Office.

- Only active members are eligible to hold office.
- Only those applicants who are present at the Spring State Leadership Conference and officially certified by the Officer Screening Committee shall be eligible for nomination.

To be considered for an office in PBL, a candidate shall:

- Have at least one full school year remaining in his/her educational program
- Have participated for at least one academic term (semester/quarter) as a member in good standing of FBLA or PBL
- Be recommended by the local chapter adviser and endorsed by his/her local chapter
- Meet all deadlines of application materials as set by the State Executive Board

**Section 5.** Nominations.

- A local chapter shall nominate the President, Vice President, Secretary, Reporter, and Web Site Coordinator at a general session of the Spring State Leadership Conferences.
- Only candidates approved by the Officer Screening Committee shall be nominated.

**Section 6.** Successions. No officer may hold the same elected position for more than two terms. No local chapter may provide the President for two consecutive

years unless the following condition exists: that no other chapters have provided a presidential candidate by the officer screening date. At this time the Executive Board may allow a presidential candidate form the chapter that is currently holding the presidency.

**Section 7.** Vacancy in Office. In case of a vacancy in the office of President, the Vice President shall assume the Presidential office. In any other elected office, vacancies shall be filled by appointment by the President subject o approval by majority vote of the State Executive Board.

**Section 8.** Appointment of Parliamentarian. The student receiving the highest score on the written parliamentary procedures test at the Spring State Leadership Conference shall be appointed Parliamentarian. This person shall have at least one year remaining before graduating from a post-secondary institution.

**Section 9.** Nomination of National Officer Candidate. An additional election following the state officer elections will be held at the Spring State Leadership Conference to determine the one Wisconsin National Officer candidate. Candidates for this position will follow the same guidelines and procedures for state officer candidates with respect to election proceedings, qualifications, and nominations. These candidates must also meet the qualifications for National Office as stated in the national bylaws.

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## **Article VII. Duties of State Officers**

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**Section 1.** The President shall:

- Preside over the meetings of Wisconsin PBL.
- Coordinate work of the elected officers and appointed committees to the extent that there is full and complete performance of their duties as said officers and chairmen.
- With the consent of the State Executive Board, create all committees and services necessary to administer Wisconsin PBL.
- Serve as chairman of the State Executive Board.

**Section 2.** The Vice President shall:

- Assume the duties of the President in his/her absence.
- Assume the office of President if the President is disabled.
- Submit the annual State Chapter Business Report for the National Leadership Conference after the close of his/her term.
- Serve as a key contact with Wisconsin FBLA

**Section 3.** The Secretary shall:

- Record the minutes of all State Executive Board meetings or shall appoint a member to do so in his/her absence.
- Maintain a permanent record of all meetings.
- Act as custodian of the official records of Wisconsin PBL.
- Be responsible for all correspondence of this organization except that delegated to other members.
- Publish an Annual Wisconsin PBL Directory

**Section 4.** The Treasurer (if appointed) shall:

- Collect all dues and fees and keep proper books of account showing all receipts, distributions, and cash balances.
- Submit a financial report at the request of the State Executive Board or any chapter member.
- Propose a budget at the first State Executive Board Meeting.

**Section 5.** The Reporter shall:

- Keep all chapters informed of state activities.
- Create a State Year in Review Presentation
- Be responsible for the publishing of at least two newsletters during the year.

**Section 6.** The Parliamentarian shall:

- Advise the State Executive Board in matters concerning the correct parliamentary law.
- Alert the President to any error in the proceedings that may affect the substantive rights of any member.
- Review annually the Constitution and Bylaws and propose any necessary amendments to the State Executive Board.
- Conduct a parliamentary procedure workshop with each local chapter during the fall semester.

**Section 7.** The Web Site Coordinator

- Create and maintain Wisconsin Phi Beta Lambda website

**Section 8.** These officers shall serve on the State Executive Board and perform such duties as directed by the Wisconsin PBL President and the State Adviser and not inconsistent with this Constitution and Bylaws or other rules adopted by Wisconsin PBL.

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**Article VIII. Spring State Leadership Conference**

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**Section 1.** A Spring State Leadership Conference will be held each year at a location to be determined by executive board. A date will be voted on by the State Executive Board.

**Section 2.** Each local chapter in good standing with a membership of 50 or less is entitled to five voting delegates with one more voting delegate for each additional 25 members or fraction thereof.

**Section 3.** All official members of the conference shall have full power to debate.

**Section 4.** The quorum for all business meetings of the Spring State Leadership Conference shall be a majority of the registered voting delegates.

**Section 5.** All election voting shall be done by secret ballot.

**Section 6.** The State President and State Adviser shall serve as tellers. The only exception being where the President is running for a state office, in which case he/she must appoint another member of the State Executive Board who is not running for a state office to serve as teller in the President's place.

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## **Article IX. State Executive Board**

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**Section 1.** Members. The State Executive Board shall consist of the Wisconsin PBL officers (President, Vice President, Secretary, Treasurer [if appointed], Reporter, Parliamentarian, and Website Coordinator), the chairpersons of the State Standing Committees, one delegate from each chapter not represented by a state officer, State PBL Adviser, and the State FBLA Adviser.

**Section 2.** Meetings. Wisconsin PBL shall hold at least two Executive Board meetings per year, the date and time of each to be decided by the State Executive Board. These meetings shall be open to all Wisconsin PBL members. A member from the chapter of an absent Executive Board member shall be appointed by the President to vote for that member.

**Section 3.** Voting. The following executive Board members shall be delegated voting privileges: President, Secretary, Treasurer [if appointed], Reporter, and Parliamentarian), one delegate from each chapter not represented by state officers.

**Section 4.** Quorum. A quorum shall consist of a majority of the voting membership of the State Executive Board.

**Section 5.** Special Meetings. Special meetings shall be called at the discretion of the State President with proper notice being given to all State Executive Board members.

**Section 6.** Executive Board Policy. The State Executive Board has the power to establish standing rules by a majority vote of the State Executive Board provided they do not conflict with the national and state bylaws. These standing rules will describe the general policy of the Executive Board.

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## **Article X. Parliamentary Authority**

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The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern Wisconsin PBL in all cases to which they are applicable and in which they are consistent with this Constitution and Bylaws and any special rules of order Wisconsin PBL may adopt.

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## **Article XI. Amendments**

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**Section 1.** Proposals. Amendments to the Constitution and Bylaws of Wisconsin PBL must be proposed in writing by any member and submitted for the approval of the State Executive Board by the Winter Executive Board meeting.

**Section 2.** Approval. Amendments to the Constitution and Bylaws shall become effective by a two-thirds vote of the voting delegates at the Spring State Leadership Conference.

Adopted October 1967  
Amended April 1978  
Amended April 1982  
Amended April 1986  
Amended April 1987  
Amended April 1988  
Amended April 1989  
Amended April 1990  
Amended April 1994  
Amended April 1995  
Amended April 1996  
Amended April 2000  
Amended April 2004  
Amended April 2005



## Scholarship Application Form

Wisconsin PBL will award a \$100 and a \$50 scholarship to qualified applicants. The State Advisory Council will review all applications submitted and will choose up to five applicants for further screening. The Advisory Council at the 2005 Spring Leadership Conference will interview five applicants. After the interviewing is concluded, the Advisory Council will select the two scholarship award winners.

If you are interested in being considered for these scholarship awards, complete the application form and supporting statements. Please submit the required materials to be **postmarked** no later than March 15, 2006. Send your materials to:

Mr. Steve Wills  
910 Shepherds Drive  
West Bend, WI 53090

Please include the following information:

Name:  
School:  
School address:  
Year in school:  
Years in PBL:  
Major(s):  
Minor(s)

Please answer the following questions thoroughly. Answers should be typewritten on one page to be attached to this scholarship application form.

1. Discuss your involvement in PBL. Include in your answer your involvement at the national, state, and local levels. (Emphasize your state and local involvement in PBL.)
2. How do you believe your involvement in PBL has contributed to your career objectives?

Candidates will be notified at the Spring Leadership Conference when your interview time is scheduled. Be prepared to discuss your PBL involvement, career goals, and the leadership impact on your organization and community. It is recommended that you bring a current resume to your interview.



### **The Selection Committee shall be composed of:**

- Phi Beta Lambda (PBL) state adviser or a university instructor of business education selected by the PBL Executive Board.
- A Professional Division representative selected by the PBL Executive Board based on recommendation by the Professional Division Board or members.
- A representative selected by the UW-Eau Claire Development and University Relations office who is responsible for coordinating the committee the scholarship recipients.

### **Criteria for the Selection of the PBL Scholarship Recipients:**

- A recipient must currently be a member of Wisconsin PBL. Each local PBL chapter may submit two applications.
- A recipient must currently be enrolled in a business education or business major and of junior standing in a degree granting college or university with at least one year remaining in his/her program of study. Preference will be given to business education majors, but all business majors may apply.
- A recipient must complete the designated application form that has been secured from the State PBL Adviser or the chairperson of the Selection Committee. *The completed form shall be submitted to the UW-Eau Claire Development and University Relations office and be postmarked no later than January 1 of the year the scholarship will be presented.* The official presentation of the scholarship will be made at the annual Wisconsin PBL State Leadership Conference.

**Phi Beta Lambda**  
**Application for the**  
**Lorraine Missling Scholarship**

Name \_\_\_\_\_

(Last)

(First)

(Middle)

College or university in which you are enrolled  
\_\_\_\_\_

**Address while attending college or University**

Street \_\_\_\_\_

City, State ZIP \_\_\_\_\_

Telephone \_\_\_\_\_

Home address

Street \_\_\_\_\_

City, State ZIP \_\_\_\_\_

Telephone \_\_\_\_\_

**PBL Local Chapter Adviser**

(Last)

(First)

(Title)

Adviser's telephone number \_\_\_\_\_

Total number of credit hours to include those currently enrolled in \_\_\_\_\_

**Record Of Your PBL Participation**

**Freshman**

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**Sophomore**

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**Junior**

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Grade point in your major field \_\_\_\_\_  
Overall grade point average \_\_\_\_\_

Recommendation from your PBL adviser regarding your potential as a business education teacher or in the career you have chosen.

Recommendation from an instructor in your business program or business major regarding your potential as a business education teacher or in the career you have chosen.

**Please send application to:**

UW-Eau Claire Development & University Relations  
Schofield Hall 214  
University of Wisconsin-Eau Claire  
Eau Claire, WI 54702-4004

**If you need further information,  
please call the UW-Eau Claire Foundation at 715-836-5630**

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## Wisconsin Phi Beta Lambda Hall of Fame

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**FBLA ΦΒΛ**

The Executive Board is pleased to continue the Hall of Fame project. The Hall of Fame is to be on display at the Spring State Leadership Conference each year.

Two qualifications must be met for a candidate to be eligible for membership in the Phi Beta Lambda Hall of Fame. They are as follows:

1. Graduate from college at least two years prior to the opening of the State Leadership Conference.
2. Candidates must receive nomination from their local chapter and the approval of the State Executive Board.

Each local chapter should go through a selection process to determine *one* candidate to be nominated into the Hall of Fame. The Board recommends that you send a letter similar to the enclosed example to all candidates and ask them to fill out the enclosed registration form. *You may want to have all interested graduating seniors fill out the form so you may keep it on file for future reference.*

After your chapter has selected its one candidate, you must contact that individual and request a 5 x 7 inch picture of him or her. This size is preferable because each Hall of Fame member's exhibit will be of equal size.

A completed Hall of Fame nomination form (you may use a copy of the form in this Handbook) and picture of the candidate must be received by the Hall of Fame Chairperson *no later than December 1 for induction at the following Spring State Leadership Conference.* The State Executive Board will then evaluate the candidate based on the following areas:

1. Involvement on the local, state, and national level
2. Offices held
3. Conferences attended

The Hall of Fame is a great honor; therefore, please be careful in your selection process. The candidate's PBL accomplishments will be on display at the State Leadership Conference and he/she will also be introduced as a new member in the Wisconsin PBL Hall of Fame.

Nomination forms must be sent no later than March 15, 2006 to:

Steve Wills  
910 Shepherds Drive  
West Bend, WI 53090

(Sample letter to be sent to possible candidates for the PBL Hall of Fame)

(Chapter President)  
(Address)  
Date

Candidate's Name  
Street Address  
City, State ZIP

Dear

Wisconsin Phi Beta Lambda has developed a project called the PBL Hall of Fame to recognize outstanding PBL members from past years. Each year, each Wisconsin Phi Beta Lambda chapter can nominate one candidate for the Hall of Fame.

Our records show that you were a prominent and active member of the Greek Name chapter of Phi Beta Lambda. If you would like to be considered for nomination to the Hall of Fame, please complete the enclosed form and submit it to Chapter President by Designated Date. Your name will be placed on file and reviewed each year for possible selection to the PBL Hall of Fame.

Please contact me at Telephone/email address for further information you may need.

Sincerely

Chapter President

Enclosure

# **PBL Hall of Fame**

## **Wisconsin Nomination Form**

### **School Information:**

School Name

Address:

### **Candidate's Information**

Name:

Address:

Years in PBL:

Graduation Date

Major Obtained:

Place Employed:

Job Title:

Job Descriptions:

### **PBL Experience**

Local Offices Held

State Offices Held:

National: offices Held:

Conferences Attended

Awards Received

One strange or unusual PBL experience . . .

How has PBL contributed to your career?

Other PBL experiences . . .



# Chapter Spirit Award

## Tabulating Sheet

(Must be turned in by close of First General Session to Steve Wills)

	<b>Activity</b>	<b>Points</b>
<b>Education</b>	<b>Speaking to FBLA Chapters</b> <i>(5 points per visit, max 15 points)</i>	
	<b>Volunteering at FBLA Regional Conferences</b> <i>(5 points per visit)</i> State Officers not eligible	
	<b>Volunteering at FBLA Wisconsin Conference</b> <i>(10 points per visit)</i> State Officers not eligible	
	<b>Participation in Stock Market Challenge</b> <i>(10 points per semester)</i>	
	<b>Participation in Junior Achievement</b> <i>(15 points per year)</i>	

<b>Service</b>	<b>Participation in WalkAmerica</b> <i>(15 points per Walk)</i>	
	<b>Donation to March of Dimes</b> \$150 – \$500 per year <i>(10 points)</i> \$501 - \$1000 per year <i>(20 points)</i> \$1001 – 1500 per year <i>(30 points)</i> Over \$1501 per year <i>(40 points)</i>	
	<b>Local Community Service Projects</b> <i>(5 points for each project)</i>	
	<b>Participation in FBLA-PBL Week Activities</b> <i>(10 points)</i> Include a 100 word essay about event(s)	
	<b>Participation in American Enterprise Day</b> <i>(15 points)</i> Include press release and news copy of news paper article	

<b>Progress</b>	<b>Wisconsin Hall of Fame Entry</b> <i>(5 points)</i>	
	<b>Phi Beta Lambda Wisconsin Scholarship Applicant(s)</b> <i>(5 points per chapter for all submissions)</i>	
	<b>FBLA-PBL Distinguished Business Leader Scholarship</b> <i>(5 points per chapter for all submissions)</i>	
	<b>PBL NLC/IFL Scholarship</b> <i>(5 points per chapter for all submissions)</i>	
	<b>Career and Membership Achievement Program Winners</b> President Award <i>(25 points per chapter)</i> Executive Award <i>(20 points per chapter)</i> Director Award <i>(15 points per chapter)</i> Leader Award <i>(10 points per chapter)</i>	
	<b>Outstanding Chapter Award</b> <i>(10 points)</i>	
	<b>Gold Key Chapter Award</b> <i>(5 points)</i>	

<b>Officer</b>	<b>Running for a State Office</b> <i>(10 points per candidate)</i>	
	<b>Running for a National Office</b> <i>(15 points per candidate)</i>	
	<b>Applying for State Committee</b> <i>(5 points per candidate)</i>	

<b>Fundraisers</b>	<b>Botika Candles</b> <i>(5 points)</i>	
	<b>Inspirational Hosiery</b> <i>(15 points)</i>	
	<b>Otis Spunkmeyer</b> <i>(5 points)</i>	
	<b>Ozark Delight Candy</b> <i>(15 points)</i>	
	<b>Profit Potentials</b> <i>(15 points)</i>	
	<b>The Promotion Source</b> <i>(15 points)</i>	
	<b>Tom-Wat Fundraising</b> <i>(15 points)</i>	

<b>Conference Attendance</b>	<b>Attending the National Fall Leadership Conference</b> <i>(10 points)</i>	
	<b>Attending the National Leadership Conference</b> <i>(15 points)</i>	
	<b>Attending the Wisconsin Fall Leadership Conference</b> <i>(10 points)</i>	
	<b>Attending the Wisconsin Leadership Conference</b> <i>(15 points)</i>	

<b>Membership</b>	<b>Increase in Local Chapter Membership</b> 5-33% <i>(5 points)</i> 34-66% <i>(10 points)</i> 67%+ <i>(15 points)</i>	
	<b>Write article for <i>Wisconsinite</i></b> <i>(5 points per article)</i> State Officers not eligible	
	<b>Write article for National PBL website</b> <i>(5 points per article)</i>	
	<b>Write article for <i>PBL Business Leader</i></b> <i>(5 points per article)</i>	

<b>Total Points</b>	
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