STARFLEET 3 REGION

STAFF MANUAL

Region 3 Regional Coordinator

Introduction:

This handbook is an effort to detail the roles, responsibilities, and information needed to help accomplish the duties of the Regional Coordinator (RC) for STARFLEET Region 3. While STARFLEET International (SFI) does have a Regional Coordinators' handbook, it is woefully out of date and lacks specifics pertinent to the operations and expectations of the RC that Region 3 has come to enjoy. The intent of this publication is to augment existing guidance found in the SFI Members' By-Laws, and Handbook.

Responsibilities:

The RC has many responsibilities. These range from representing the region on the Admiralty Board (SFI's Board of Directors), to filing the Regional Status Report, to running and/or coordinating events throughout the region, and satisfying the region's financial responsibilities. It is a huge job, but a rewarding one.

Admiralty Board -

The RC sits on SFI's Board of Directors, known as the Admiralty Board (AB). As such, the RC is required to attend scheduled meetings of the AB and the combined Executive Committee/Admiralty Board (ECAB). Further, the RC must read and participate on the various AB/ECAB e-mail lists. Per the Members' Handbook, Section 3:06 – The Regional Coordinator, an RC can be removed for failure to cast votes in 75% of the matters put before the AB. Recently it was announced that the AB may conduct votes via electronic voting – this, combined with the e-mail lists, leaves no room for an RC to fail to vote on a matter, and thus appropriately represent the region.

Region 3 is the birthplace of SFI, and the chapters and members here have come to expect their RC not only to participate, but be very active and lead discussion in the AB/ECAB.

As a member of the Corporate Board of Directors, the Regional Coordinator has very real legal duties to the organization. While the SFI Regional Coordinators' manual is out of date, it does still describe the fiduciary duties that are required of all board members and corporate officers. Each RC, or potential RC, must be ready and willing to assume these legal responsibilities to the corporation that is SFI.

Regional Status Report -

The Regional Status Report (RSR) is due by the 15th of every month. This is generally accomplished via use of the SFI DB (db.sfi.org). While the form looks quite easy, there are some undocumented issues that an RC needs to be aware of and attend to.

To file the RSR, log into the database, Navigate to the Region Menu, and then 'Submit RSR'.

1) The database (DB) fills in the "General Comments" and "Chapter Notes" fields from the last report filed ... regardless if that report filed was an MSR for the current month. Be sure to edit out old data that has been reported before if a chapter fails to report. You can replace the old comments with "Failure to Report" to make things easier on Fleet Ops. Also, if a chapter puts in new information and hits "save", in preparation of a future MSR filing, THAT data will appear in the RSR, unless you go back and find the correct information to paste into the RSR.

2) The comments are often hard to read in the emails you receive due to the automatic formatting. Because of this, you may find it easier to go into the 'Submit RSR' and either read there, or copy and paste the items out of it to review. This also makes the above task easier.

Further, the RC will make a recommendation as to any chapter status changes to SFI's Chief of Operations as needed.

Finances -

Banking:
Region 3 currently uses Frost Bank. Any transition between RCs needs to take place in person at a Frost Bank location. There is a primary region account, and a separate Region Relief Fund account. The Relief Fund will be discussed in a separate manual.

Paypal:
Region 3 has a business class PayPal account. As such the RC is required to periodically file a W-9 with them, confirming our Employer Identification Number.

Taxes:
TAX STATUS: Region 3 is an unincorporated non-profit association in the State of Texas and is recognized as a tax-exempt 501(c)(7) entity with the IRS.

Federal IRS: R3 does not need to pay income tax with the IRS unless it makes more than $50,000 per year and/or over $1,000 in unrelated business income, but R3 has never come close to those amounts. R3 does need to file an annual Form 990-N

(https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard) (e-Postcard) with the IRS, which states that: we are still doing business, that we made less than $50,000 in the year, and what our website url is.

Texas: R3 doesn't make the cutoff for paying the Texas corporate luxury tax (Franchise Tax), but we still have to file an annual "no tax due" report by May 20 with the Texas Comptroller. R3 has a Sales Tax Permit and is required to pay sales tax annually by Jan 20th to the Texas Comptroller. Both the Texas Franchise "no tax due" report (May 15) and the Texas Sales Taxes (Jan 20) are filed using the same [WebFile](https://mycpa.cpa.state.tx.us/securitymp1portal/displayLoginUser.do) (https://mycpa.cpa.state.tx.us/securitymp1portal/displayLoginUser.do) system with a login that is personal to the user.

Louisiana: R3 does not, at this time, have a sale tax permit in the state of Louisiana. If events are held there, the RC and RFO will review the situation, and apply for one as needed for events held there.

Financial Committee -

The Financial Committee consists of the RC, the VRC, and the RFO. Any new expenses over $100 must be reviewed and approved in advance by the Financial Committee before being paid. Regular and planned-for expenses (payments to summit hotel, taxes, etc.) will be paid normally, without this added process. The Financial Committee will be able to review all transactions made by the region.

Promotions -

The RC is responsible for ALL promotions of unassigned members within the region and all promotions to the grade of O-6 (Captain/Colonel). Given that chapters often have very different standards for promotions, the RC must keep promotions to O-6 fair across the board. As such, it is HIGHLY recommended that the RC adopt a policy and stick to it.

The RC must also provide recommendations to promotions of O-7 and above. These must also be kept fair across all sources. As such, a similar policy is encouraged.

Staff:

(From Region 3 Handbook)
The Regional Staff is designed to aid and assist both the Regional Coordinator ("RC") and Region 3's chapters and members through the fulfillment of their respective positions. The Staff performs the day-to-day operations of Region 3, as well as aiding

in the development of procedures and implementation of policies that are deemed necessary by *STARFLEET* and Region 3.

Service as a member of the Region Staff does not exclude anyone from serving their chapter in any capacity and no conflict of interest is intended or anticipated. The purpose of the staff is to assist the RC by offering suggestions, giving alternatives, and coordinating between chapters and Region 3 Members, as required by their positions. All Region Staff are required to have completed STARFLEET's Officer Training School ("OTS"). STARFLEET's Officers Command College ("OCC") is required for any department head (VRC, CAO, Chief of OPS, Chief of COMMs). Exceptions are on a case by case basis.

Region Staff positions are appointed by the RC. Terms are set at two years, with all terms beginning on January 1 of the year after the RC's term begins (even numbered years). This is the minimum expected service commitment, barring unforeseen issues (It is understood that life changes, and circumstances may change, preventing the completion of a two year term). Consecutive terms may be served if re-appointed by the RC. All Region Staff members serve at the pleasure of the RC.

All Region Staff Members are required to submit articles to the region newsletter, *Fleet Channels*, to update the membership on their work for the region, on a rotating monthly basis (not every officer each month). This schedule will be set by the Chief of Communications and the RC.

The RC assumes an additional legal duty of Reasonable Supervision for any staff members they might appoint. The RC must supervise and inquire as to progress on any work they have given to delegates (Staff members). The RC is responsible for any misconduct of staff officers using information that was intended for official and proper uses.

Congress of Commanding Officers:

The RC will give the membership at large, and the Congress of Commanding Officers (CCO), an update at least monthly. For Member-wide information, this will be a post to the *Fleet Channels* blog. For CCO specific/sensitive information (like specific financial matters, or matters requiring awareness/input/discussion), the RC will send a separate email to the CCO email list.

Regional Coordinator Special Staff

Intro:

These are staff members and roles that support the RC directly in critical areas or special projects.

Regional Financial Officer -

The Regional Financial Officer (RFO) assists the RC in all financial matters. The RFO may be delegated oversight or directed to perform the duties of the RC's financial responsibilities (though the RC will ALWAYS retain ultimate responsibility). They will assist the RC and VRC to set the region's budget, if needed. An RFO should be familiar with state and federal taxes for non-profits, especially unincorporated organizations, sales tax requirements, franchise taxes, etc. The RFO should have access to copies of bank statements, PayPal statements, Square statements, etc. in order to review and provide Regional financial reports to the CCO. The RFO also serves on the Financial Committee. The RFO assists in any way needed with the annual charity auction at Summit, including accepting and recording charity payments, and any other Regional fundraisers whether at Summit, Game Days, or other events.

Regional Quartermaster -

The Regional Quartermaster (QM) suggests Region 3-branded items to procure, runs the R3 quartermaster store (both online and at Region events), and works with the RFO and RC to maintain compliance with laws/regulations for all Region 3 Quartermaster transactions.

The QM will also coordinate with the SFI/SFMC Quartermaster(s) to make their items available to Region 3 events as needed.

The QM will also assist the RC by coordinating with 3rd Brigade (3BDE) concerning the jointly-held and maintained inventory of equipment, if any, plus all R3 equipment and updating an Inventory List. The QM will ensure all items' locations are tracked, review and document the state of repair of all items, and ensure items are checked out/checked in to members as needed. Currently, the contact for coordinating these efforts with the Brigade is the Brigade Sergeant Major.

Note - presently the two above roles RFO and QM are wrapped into one staff position.

Region 3 Flag Lieutenant -

The Flag Lieutenant (Flag LT) assists the RC in various projects, and at Region events. This role is intended to introduce new people into R3 staff. It is specifically an opportunity for mentorship. This role may change frequently to get more members experience.

Note: The Flag LT is intended as an entry level post, but the position is not restricted to rank. Specific title may change depending on rank of the individual(s) assigned.

Vice-Regional Coordinator Office

Introduction:

Per STARFLEET regulations the RC must appoint at least one Vice Regional Coordinator (VRC). The primary role of the Vice Regional Coordinator is to serve as back-up to the RC, and to perform the duties of the RC should the RC be unable to perform his/her duties at any given time. Per STARFLEET regulations, should the RC resign or be removed from office prior to the end of the designated term, the VRC serves at Acting RC until an election brings a new RC into office. The VRC must be able and willing to assume all the legal duties of the RC, in case such a need to step up to the role occurs.

As back-up to the RC (and to be prepared should the RC be unable to perform a duty/duties), the VRC must stay current with the discussions and actions of the STARFLEET Executive Committee and Admiralty Board (ECAB). The VRC is added to the ECAB and AB email lists by SFI and must keep current of ECAB activity by reading the emails in a timely fashion. The VRCs are not on the AB voting list. That function would only be activated by SFI should the administration have verification that the RC is unable to perform that task at that time.

The VRC is added to the Region Staff email list, and other relevant email lists / communication mediums, conducted by the Region, and can post or reply to relevant discussions, requests, and votes. The VRC participates in Region Staff meetings by whatever means are being utilized, and contributes to the functions of the Region and its departments through these discussions.

The VRC must stay informed of the activities of the Region's chapters by reading the Monthly Status Report (MSR) submitted by each chapter. Permission in the database to view this section and other important or relevant parts of the database must be set up by the RC. The VRC also serves on the Region Award Committee and participates in the judging of annual awards, in accordance with the regulations specified in the Region Awards Manual. The VRC also serves on the Financial Committee. The VRC should be very familiar with all Region documents and manuals.

Other VRC duties presently assigned:

Chief of Staff -

The VRC presently acts as the R3 Chief of Staff, coordinating efforts between staff departments and personnel, and tracking efforts as needed.

Consolation/Anniversary Card Program -

The VRC will track chapter anniversaries and send a congratulatory card to mark these happy occasions. The VRC will also issue consolation cards to the family, or to the chapter if direct family cannot be reached, in the case of a member passing away.

Region 3 History office -

A team in the VRC Office, the History office is comprised of a wiki administrator and any needed primary contributors and data input assistants.

Regional History Administrator -

The Regional History Administrator will maintain the region history wiki, and work with the COMMS department to ensure the wiki software is kept up to date and secure. They will develop and maintain the wiki structure and templates as needed.

Primary History Contributors/Historians -

Recruited as needed, these team members will help the history administrator input data to the history wiki, and solicit input from others around the region (and beyond) - assisting them to add their inputs into the wiki.

Charity Tracking -

The VRC is tasked to maintain a point system for the RC Charity Cup, and compile the points each year in January to determine the new winner. Points are presently based on information taken from Monthly Status reports. The VRC will also oversee the Regional Charity Officer, who tracks a broader scope of efforts, and relays that information back to the region periodically.

Regional Charity Officer -

The Region 3 Charity Officer will assist the VRC in tracking all chapters' charity efforts, rolling up statistics and regularly disseminating those figures back to the region in a

meaningful way for the use of recruiting and retention. As this is a new program, this is a special office reporting directly to the RC until the program is more mature. The intent is to make this program adoptable at the fleet level as well, and become one step in the overall effort across the entire SFI organization.

Region 3 Administrative Department

Introduction:

The Regional Administrative Department is responsible for the development and maintenance of all Region 3 documentation (R3 Handbook, Awards manual, etc.), taking notes at R3 staff meetings and implementation of R3 awards program.

Chief of Administration -

The Chief of Administration/Chief Admin officer (CAO) it responsible for the Administration department. The CAO will take notes during each staff meeting and CCO meeting as needed. They will maintain the region awards and recognition program and documentation, chairing the awards board each year.

- The CAO will oversee the organization of R3 data, and collaborative work spaces (Google Drive at this time).
- The CAO must keep all region documentation up to date, to include helping the RC draft new documentation as needed.
- Work with the communications department for all technical needs in implementation of the awards and recognition programs.

Region Operations Department

Introduction:

The Regional Operations Department (OPS) is a collection of staff who are tasked as needed to assist the RC in overseeing chapter reporting, event planning, and assisting chapters and members with their own events.

Chief of Operations -

The Chief of Operations oversees the department, and is the main assistant to the RC for the purposes of reporting. The Chief of Operations will send out monthly reminders to the Congress of Commanding Officers (COO) concerning the Monthly Status Report (MSR), track late and on-time reporting of each chapter, and maintain an awareness of the MSR contents for the purposes of tracking upcoming and past events.

The Chief of Operations will also maintain a list of the region's unassigned members who do not wish to be contacted.

The Chief of Operations will have (unless later SFI requirements prevent this) database access covering the region roster, region vessel registry, and region unassigned list. Additionally, the Chief of Operations will have access to whatever event ticketing system the region is presently using, to help track and manage events.

Vice-Chief of Operations -

The Vice-Chief of Operations will assist the Chief of Operations in all their duties, ready to take over the role if needed. That said, the VCO also is specifically tasked as the region Shakedown Operations officer. In this role the Vice-OPS oversees the progress of chapters in training throughout the Region: ensuring milestones are met, and that the assigned support chapter is helping.

Event Coordinator/Liaison -

The Event Coordinator will research events throughout the Region's area of operations (AOR) - Texas and Louisiana, that may be of specific interest to the chapters and members of this Region. Conventions, other fan organizations' events, or other events are all considered. They will disseminate this information in a timely fashion, and assist Region 3 members/chapters to get involved with a given event.

The Event Coordinator will also serve as a liaison to other fan organizations, specifically to promote and help organize joint events.

The Event Coordinator will also assist Chapters in advertising their own events, and provide guidance/assistance as needed in planning events.

This is a new role, and may require assistants in the future. Until then, this post's primary focus will be development and documentation of the role.

Event Chairs -

Regional events, such as Summit, have Chairpersons heading up these efforts. Each event chair will fall under the Operations department during the planning, execution, and recovery phases of each event. Event Chairs will have access to the current region ticketing program.

Region Role Play Manager-

The Primary/Master Game Master (GM) for Region efforts in Role play. Coordinates efforts of other volunteer GM's on a rotating basis. This is a new post, and the primary duty is to focus on development and documentation of the role.

Regional Communications Department

Introduction:

The Region 3 Communications department (COMMS) is responsible for all the technical/IT aspects of the region, as well as overseeing the relay of communications to/form the region via the SFI communications departments. This department also oversees the Social Media efforts of the region.

Chief of Communications -

Reporting to the Region Coordinator, the Chief of Communications will set and guide the strategy for all regional communications, website, and public relations messages and collateral to consistently articulate STARFLEET Region 3's mission. The Chief of Communications will ensure that STARFLEET Region 3 is viewed as the primary source, disseminator, and conduit of information within the Chapters of Region 3 and its members.

The Chief of Communications will work closely with the other Regional Staff Members and Commanding Officers within the organization as the communications partner on a variety of strategic initiatives.

Responsibilities

- Develop, implement, and evaluate the annual communications plan in collaboration with the Region 3 Staff and chapters
- Lead the generation of online content that engages audience segments and leads to measurable action. Decide who, where, and when to disseminate
- Put communications vehicles in place to create momentum and awareness as well as to test the effectiveness of communications activities
- Manage the development, distribution, and maintenance of all print and electronic collateral including, but not limited to, newsletters like FLEET CHANNELS, brochures, social media, and Region 3's website
- Mentor and lead a team member responsible for Region 3's website administration and coordination
- Coordinate webpage maintenance—ensure that new and consistent information (article links, stories, and events) is posted regularly
- Track and measure the level of engagement within the network over time

- Manage development, distribution, and maintenance of all print and electronic collateral including, but not limited to, newsletters, brochures, business cards, e-newsletters, and Region 3's website
- Manage all media contacts

The Chief of Communications will also fulfill at least one of the COMMS duty roles directly.

Vice-Chief of Communications -

This member assists the Chief of Communications in managing the COMMS department. They will perform at least one of the assigned duty roles, in addition to this leadership role.

COMMS duty roles -

Fleet Channels Editor in Chief -

Main editor of the ongoing publication, "*Fleet Channels*" -- includes soliciting articles, obtaining photos and art, layout, design and proofreading the document for electronic publication. They will also compile a semi-annual PDF version as well, for archival purposes.

Web administrator -

Primary administrator of the Region 3 website and other web services. The Web Admin will keep the site(s) up to date, and create/edit pages as required.

At this time, the Web Admin must be familiar with Wordpress, as that is the Region website platform. Must be able to maintain and add functionality to the website as needed.

Email Administrator -

Administers the various Region 3 email lists, email accounts and email forwarders.
At this time the Region email lists include:
Region 3 general discussion list

Region 3 Staff list
Region 3 Unassigned list
Region 3 CCO list
Region Assistance Fund board list
Role Play list

A list of email accounts and forwarders presently being maintained by Region 3 can be found in Appendix A.

Region Information Officer -

Primary point of first contact to newly assigned members of Region 3, and prospective members seeking information on how to join. They will guide prospective members in finding a chapter, if that member so wishes; doing their best to impartially match the member to the the chapter that will best suit them.

This person will also be a Region Relay Officer, joining the applicable SFI lists to forward information to/from SFI COMMS department.

Social Media -

The Social Media Manager will administer the region's social media marketing and advertising. Administration includes but is not limited to:

- Overseeing all social media platforms including Instagram, Facebook, Twitter, Snapchat, YouTube, blog, etc.
- Approving all Facebook Group Requests
- Development of brand awareness and online reputation
- Generate, edit, publish and share daily content (original text, images, video or HTML) that builds meaningful connections and encourages community members to take action

Database Administrator (reserve function) -

This is not a full time post, but a member that has volunteered to be 'on call' should the Region COMMS department require specific database assistance. Must be familiar

with presently used database technologies that the region is using (at this time, MySQL backend of Wordpress).

Other Staff as required

Introduction:

As needed, the RC will appoint other staff to a specific purpose or project. Duration of these roles, scope, and responsibilities will be identified at that time. It is understood that the RC requires flexibility to bring people into the staff environment to accomplish new goals, and those may not fit into previously defined roles. Roles may be temporary to achieve a specific goal, or become permanent, and would then be included in the next revision of this manual.

Roles:

None at this time.

Appendix A - Current email forwarders

Forwarder	Destination
admin@rp.region3.org	rc@region3.org
awards@region3.org	cao@region3.org
awards@region3.org	rc@region3.org
awards@region3.org	vrc@region3.org
cao@region3.org	<To Staff member email>
charity@region3.org	<To Staff member email>
charity@region3.org	rc@region3.org
charity@region3.org	vrc@region3.org
coa@region3.org	cao@region3.org
comm@region3.org	comms@region3.org
comms@region3.org	<To Staff member email>
emailadmin@region3.org	<To Staff member email>
eventco@region3.org	<To Staff member email>
events@region3.org	finance@region3.org
events@region3.org	ops@region3.org
events@region3.org	rc@region3.org
events@region3.org	vrc@region3.org
finance@region3.org	<To Staff member email>
flaglt@region3.org	<To Staff member email>
fleetchannels@region3.org	comms@region3.org
fleetchannels@region3.org	info@region3.org
fleetchannels@region3.org	rc@region3.org
gm@region3.org	<To Staff member email>
history@region3.org	<To Staff member email>
history@region3.org	<To Staff member email>
history@region3.org	<To Staff member email>
histsory@region3.org	<To Staff member email>
info@region3.org	<To Staff member email>
media@region3.org	<To Staff member email>

media@region3.org	comms@region3.org
ops@region3.org	<To Staff member email>
owner-r3cco@lists.region3.org	r3cco-owner@lists.region3.org
owner-r3list@lists.region3.org	r3list-owner@lists.region3.org
owner-r3staff@lists.region3.org	r3staff-owner@lists.region3.org
owner-raf_board@region3.org	raf_board-owner@region3.org
owner-region3-unassigned-l@region3.org	region3-unassigned-l-owner@region3.org
owner-rp-l@lists.region3.org	rp-l-owner@lists.region3.org
owner-uss-new-orleans-discussion@region3.org	uss-new-orleans-discussion-owner@region3.org
paypal@region3.org	finance@region3.org
paypal@region3.org	rc@region3.org
paypal@region3.org	vrc@region3.org
postmaster@region3.org	emailadmin@region3.org
qm@region3.org	<To Staff member email>
qmstore@region3.org	qm@region3.org
qmstore@region3.org	rc@region3.org
r3admin@region3.org	rc@region3.org
relief@region3.org	qm@region3.org
relief@region3.org	rc@region3.org
relief@region3.org	<To Staff member email>
relief@region3.org	vrc@region3.org
socialmedia@region3.org	<To Staff member email>
summit@region3.org	ops@region3.org
summit@region3.org	rc@region3.org
summit@region3.org	vrc@region3.org
vops@region3.org	<To Staff member email>
vote@region3.org	cao@region3.org
vote@region3.org	rc@region3.org
vote@region3.org	vrc@region3.org
vrc@region3.org	<To Staff member email>
wpadmin@region3.org	comms@region3.org
wpadmin@region3.org	info@region3.org
wpadmin@region3.org	rc@region3.org