



Linked in Friendship, Connected in Service

# TECHNOLOGY REFERENCE GUIDE



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## Table of Contents

<b>Topic</b>	<b>Page</b>
Introduction	2
Section 1 – Roles and Responsibilities	3
Section 2 – Chapter and Member Password Management	3
Section 3 – Cyber Security Principles	5
Section 4 – Websites	6
Section 5 – Email	11
Section 6 – Group Messaging	12
Section 7 – Social Media Guidelines	13
Section 8 – Document Retention/Protection	15
Section 9 – Cloud File Storage Services	15
Section 10 – Electronic Voting and Meetings	17
Section 11 – eCommerce Accounts	17
Section 12 – Mobile Applications for Chapter/Area	17
Acknowledgments	20
Revision History	

## Introduction

This document outlines The Links, Incorporated guidelines about various aspects of the Internet and Internet-based tools and services, including websites, email, social media, applications (commonly called "apps"), cloud file storage services, and the use of merchant accounts. Guidelines and best practices in one section of this document may also apply to other areas. You are strongly encouraged to review and understand this document in its entirety.

### **The National Technology Committee maintains the Links Technology Reference Guide.**

These guidelines have been prepared in the interest of:

- Protecting The Links, Incorporated, The Links Foundation, Incorporated and its members to minimize potential legal liability.
- Providing a framework for areas, chapters, and individual members to communicate via digital tools and processes.
- Assisting the organization in efficient and effective operations.

The Links, Incorporated has intellectual property interests in its symbols, ceremonies, and other materials that need protection from legal risks. Accurate, complete, and current information is critical to legal protection. Ensure that you adhere to all the policies as articulated through our governing documents and the Links Technology Reference Guide as provided in this document.

## Section 1: Roles and Responsibilities of Technology Team

The role of the Technology Chair is to provide the strategic direction to the area/chapters. The Chairman is on the effective utilization of technology to increase communication and connection throughout the membership. They should be well-versed in our beloved organization's governing documents, financial handbook, communications, and marketing. Technology must work closely with the Communications and Public Relations chair to ensure alignment. The chair should address technology issues throughout the area/chapters and be willing to learn new software, investigate existing software, address training issues and support others. Some key characteristics of the technology chair are patience and willingness to engage others. They should also be problem-solvers, resourceful, collaborative, and able to communicate the limitations and aid with prioritizing technology skills within their respective areas/chapters.

The Technology team should be a diverse team with strategic thinkers and technical support. Having a diverse team will enable the hands-on support needed to execute the needs of the area/chapters while the strategic planner is overlooking the overall health of the area/chapter and looking at next generation enabling technologies and risks to mitigate vulnerabilities.



## Section 2: Chapter and Member Password Management

Each chapter has been assigned an email address that allows for consistency across the organization and other internet services to which they may subscribe. With increasing cybercrime, it is imperative to maintain both strong and confidential passwords. **Passwords should be changed with every administration/leadership transition.**

The following section includes guidelines for managing chapter passwords. To meet minimum security standards, passwords should meet the following criteria:

- Be at least eight characters long (*12 is recommended*) and should not include more than two consecutive characters of any one class (number, uppercase letter, lowercase letter, special character).
- Include at least one numeric character (0-9)
- Include at least one uppercase letter (A, B, C, D, ...)
- Include at least one lowercase letter (a, b, c, d, ...)
- Include at least one special character, if allowed by the website (\*, &, \$, @)
- Avoid using common words and/or phrases in a way that may easily be guessed.

**Online Accounts Passwords**  
(online services like cloud storage, websites, merchant accounts, etc.)

- Must be registered with the chapter email address established for the officer/committee chair responsible.
- Account information must be passed on during the transition of officers.
- Passwords must also be changed during transition time or whenever the responsible party can no longer fulfill her duties.

**User Passwords to Member's Login Area**

- The password must be changed at least yearly.
- It must not be shared with other members of the chapter. The UserID is unique to the individual member.
- The Members Login Area is available to members classified as Active, LOA, Platinum and Alumna.
- Access to the Members Only section should be used with your personal electronic device. Using a company-issued device may block your access due to company security policies.

**Social Media Accounts**

Administrative access to authorized social media accounts (i.e., Facebook, Instagram, Twitter) must be changed yearly and/or modified as appropriate. This includes passwords, access information, and any other information related to the social media account.

**Securing Critical Documents**

All documents containing financial information, membership and trademark must be stored in a secured document with access granted to members only (i.e., Chapter Websites, Dropbox, Google Drives)

## Section 3: Cyber Security Principles

The Technology Committee stresses the importance of understanding and protecting Personally Identifiable Information (**PII**). PII is any data that can be used to identify a particular person.

Examples of PII include, but are not limited to:

- Name
- Social Security Number
- Driver's License Number
- Mailing Address
- Banking Account Number
- Passport Number
- Links Member Number
- Credit card numbers
- Date of birth
- Telephone number
- Login details

Always protect your identity. Members of the organization must not include their Member Number in emails unless it is explicitly requested and required for the transaction of business (i.e., Assembly, Conference event registration). The Links, Incorporated System Identification, and Membership numbers must never be posted to external or internal websites, social media, or group communication tools.

Officers who handle PII as part of their formal duties in the organization must not share PII with unauthorized persons. All PII on printed material must be safeguarded and shredded prior to disposal.

### **Other Cyber Best Practices**

The use of USB devices is strongly discouraged. If a USB device is used, it should be scanned to check for viruses that can be passed on to your computer. Avoid using USB devices for transferring data within the chapter, but instead, consider using collaboration tools such as Dropbox, Google Drive, etc.

It is essential to:

- Securely manage your accounts by practicing safe computing habits
- Use social networking sites responsibly.
- Keep software up to date.
- Keep hardware up to date.
- Use anti-virus and anti-malware and regularly update to recognize the latest threats.

- Check links before you click.
- Don't be lazy with your passwords!

### **Before You Open Documents**

- Verify that the email address is not a clone of someone else's.
- Avoid opening suspicious emails.
- Never set your email program to "auto-open" attachments.
- Never click on a link from an untrusted source.
- Never reply to email (s) requesting financial or personal.

## **Section 4: Websites**

### **National Website**

The National President reviews and approves all information on the national website. The national website is the sole source of the following topics:

- *History and Leaders of the Organization*
- *How To Engage With The Links, Incorporated and The Links Foundation, Incorporated*
- *Members Only Portal*
- *Key Initiatives/Endorsements*
- *Meetings and Events*

Areas and chapters with websites must link to the national website for this information.

### **Area/Chapter Websites**

The information contained in this section applies to all websites owned by an area or local chapter of The Links, Incorporated. This includes the primary website and any secondary websites made for special occasions.

**IMPORTANT NOTICE:** A designee must secure the domain name and host for the website using the chapter's email and mailing addresses. This ensures that the areas/chapters can control the domain name and content.

All information on the area/chapter website must be reviewed and approved by the area director/chapter president. The area director/chapter president will be held responsible for the content of their respective website.

## Website Content at-a-Glance

As you build and maintain your websites, the following guidelines must be followed:

Mandatory	Allowed	Banned
Official Links Logo Specific to the Area or Chapter  <i>(Refer to Official Logo Usage Guide – National Website)</i>	Area/Chapter History  Officer Profiles  Area Director/Chapter President Welcome Message  Links History (must be verbatim from the National Website)	Individual Themes of Chapters
Disclaimer	Area – Listing of Chapters and links to their websites	Ritual and Ceremonies
Contact Information	Past Area/Chapter Leadership	Copyrighted/Illegal material
Links to the National Website	Links to Area Website	Financial Documents open to the public
Current Officers	Event Calendar and Contact Information	
	Sponsors	
	Photos of the Event (provided release forms have been signed)	

### Mandatory Information

Official Links Logo Specific to the Area or Chapter

The official logo for each area and all chapters is located in the DOCUMENT portal in the Documents folder. (may need to provide more directions)

Disclaimer Statement:

Websites must contain the following statement verbatim.

This website is the sole property and responsibility of the *[YOUR AREA/CHAPTER NAME HERE]* of The Links, Incorporated.

Contact Information: Websites must contain contact information such as mailing address, chapter email address, and phone number (if applicable).

This information should appear on the website's main page and/or contact page.

Links to the National Website & Area Website Websites must contain a link to the national website and the respective area website (if one exists). The links must be provided using one of the following statements verbatim.

*National Website*

For more information, visit our national website at [www.linksinc.org](http://www.linksinc.org).

Visit The Links, Incorporated national website at [www.linksinc.org](http://www.linksinc.org).

*Area Website*

For more information, visit the *[your area]* Area's website at *[AREA WEBSITE ADDRESS]*.

Visit the *[your area]* Area's website at *[AREA WEBSITE ADDRESS]*.

Current Officers At a minimum, websites must include the chapter president or Area Director's name and email address. See the Chapter Email Accounts section for additional information and examples.

Current officers' personal mailing addresses, email addresses, and/or phone numbers **must not** be included on chapter websites.

### Allowed Information

Area and chapter websites may include but are not required to include the items in this section.

**Links Incorporated History:** The following statement regarding The Links, Incorporated history may appear on chapter websites, verbatim:

#### ***About The Links, Incorporated***

The Links, Incorporated is an international, not-for-profit corporation established in 1946. The membership consists of more than 17,000 professional women of African descent in 299 chapters in 41 states, the District of Columbia, the Commonwealth of the Bahamas, and the United Kingdom. It is one of the nation's oldest and largest volunteer service organizations of extraordinary women committed to enriching, sustaining and ensuring the culture and economic survival of African Americans and other persons of African ancestry. Members of The Links, Incorporated contribute more than 1 million documented hours of community service annually — strengthening their communities and enhancing the nation. For more information, visit [www.linksinc.org](http://www.linksinc.org).

**Charter Members:** Chapter websites may include the chartering date, charter members, the location of the chartered chapter and the chapter organizer.

**Chapter History:** Any significant historical information about the chapter that is newsworthy.

**Significant Information:** Chapter websites may contain the name and year of awards, stellar programs, outstanding recognition for service, press releases, and news articles about the chapter.

**Chapter Leadership:** Chapter websites may contain general information on current chapter leadership and past chapter presidents (the years they served should also be listed). Photos can be used with permission.

**Calendar of Events:** A calendar may appear on the chapter website. The calendar may include dates for:

- Public chapter events
- Public community outreach events
- Fundraisers

**Photographs:** Chapter websites may include photographs depicting members participating in chapter activities, public service events, or photographs directly related to the chapter. Appropriate release forms should be signed.

**Event Contact Information:** The names and chapter email addresses of the officer or committee responsible for a chapter event or fundraiser, or the chapter's general email address, must be listed.

**Online Sales:** Payment links for public events, ticket sales, events, registration, fundraisers, or other activities that are open to the public. The chapter must follow the guidelines as outlined in the Links Financial Manual.

### **Members Only Restricted Area**

Websites may include a members-only area and/or password-protected documents.

This area, including any items hosted within, **MUST NOT** be accessible to individuals, not chapter members.

A chapter member must maintain the members-only area content. Access to documents within the chapter member section cannot be accessible to a vendor.

The following information must be placed in a members-only area **or** saved as password-protected. Examples of documents that should be protected include the following:

- Chapter treasurer reports, to include budgets
- Internal Audit Reports
- Financial secretary reports
- Chapter roster

*NOTE: The chapter may not share contact information or any details of the chapter roster with anyone outside of the chapter. This includes distribution lists to outside resources.*

### **Banned information**

**Links Pledge:** The Links Pledge is given to those women who have been inducted into The Links, Incorporated and may not be displayed on websites.

**Official Link Songs:** The following official songs may not appear on websites in any form (for example, streaming, audio, text, etc.):

- The National Song of The Links, Incorporated
- Candlelight Song

**Ritual/Ceremonies:** Ceremonies, formal openings, and Links Induction activities are closed for members only. These events may not be shared with non-members, on the Internet, or through social media.

Photographs and/or depictions of ceremonies or the ceremonial table are prohibited.

**Copyrighted Material or Illegal Material:** Websites may not include copyrighted or illegal material. This includes works of art, music, and video.

**Political Endorsements:** Chapters are prohibited from directly or indirectly participating in or intervening in any political campaign on behalf of or in opposition to any candidate for elective public office.

**Advertisements:** Chapters may not monetize their website. This includes affiliate advertising programs, pay-per-click, pay-per-impression, and pay-per-sale. Chapters are discouraged from using free web hosting services that provide automatic advertising on websites.

### **Best Practice: Chapter Website Review**

Chapters should have one primary website. It is the responsibility of the chapter president or her designee to review the chapter's website at least quarterly. The review should include a technical and content audit. It should be conducted by members of one (or more) of the following committees: communications, public relations, technology, and/or a chapter officer.

Necessary updates or changes should be communicated to the chapter web admin following each review. To maintain a consistent online presence, chapters should search the Internet regularly to locate any legacy websites. Any websites (i.e., created during a prior administration) used to represent the chapter should be taken down as soon as possible.

## Section 5: Email

The information contained in this section pertains to all emails exchanged by members while conducting the business of The Links, Incorporated.

### *Receiving Emails from National Headquarters, President and/or National Committee*

Link members must use a personal email account to receive emails from National Headquarters, the National President and/or National Committees instead of their professional/work email address.

### *Forwarding Emails*

Do not forward emails containing Links information or official Links business to non-members.

### *Chapter Email Accounts*

The information in this section pertains to all email accounts and social media inboxes owned by chapters of The Links, Incorporated.

**Establishment & Maintenance:** All chapters must utilize the chapter email account issued by National Headquarters for official communication with National Headquarters, chapter members and the public.

The passwords to chapter email accounts must be changed whenever officers change (i.e., during election cycles/transition, resignation, impeachment). Refer to Section 1 for more information.

### *Transition*

Access to the chapter email account provided by National Headquarters must be passed on to the new chapter president when a president is elected. This includes passwords, access information, and any other information about the email account.

The transition period may vary by chapter but should be completed no later than September 30th. Consult your chapter's manual of procedures for timing.

### *Mailing Lists*

Chapters may create an email distribution list using email marketing services (for example, Constant Contact, MailChimp, Benchmark), list-serve (for example, Google Groups, Topicbox), or online collaboration tools (for example, Microsoft Teams, Slack) for internal chapter use.

Chapters may also create an email distribution list using email marketing services or list-serves for mass notification and event promotion or to distribute electronic flyers to the community. Instructions for how to join and/or sign-up forms for these lists must be publicly available, easy to find, and clearly labeled on the chapter's website, social media platforms, or event sign-in sheets as appropriate.

### *Recipient Privacy*

When sending emails to five people or more or groups (internal or external), it is a best practice to use the 'bcc' (blind carbon copy) option. This allows each recipient to only see their email address.

**Do not** forward email that includes the previous recipient's email address.

### *Sharing Documents Outside of Chapter*

Although documents may be stored using a cloud file storage service (for example, Dropbox or Google Drive), this may not be feasible for sending documents to recipients who are not members of the chapter or do not use these services. Email is an appropriate option to send documents between chapters, National Headquarters, National Officers, Area Officers, or partner organizations unless otherwise directed.

## **Section 6: Group Messaging**

Group messaging services/apps—for example, Call Messenger, Calling Post, Remind, GroupMe, Whatsapp, Telegram, Signal, and/or group texts—have become increasingly popular as a quick and easy communication method.

Many chapters recognize this and use these services/communication tools to provide real-time information and reminders to chapter members and/or external recipients.

Before selecting an app, chapters should closely review the service provider's **privacy** policies and terms and conditions.

The information in this section pertains to group communications the chapter sends to its members and/or external recipients using these services.

### *Usage*

Chapters may use robocalling, text messaging, and/or mass messaging services to send alerts about, but not limited to:

- Meeting and event details, updates, and reminders
- Meeting and event cancellations due to weather or power outage
- Quick dissemination of unforeseen information, such as emergency notifications and date/time/location changes
- Attendance or Emergency Management Polling
- Communicating with Program Participants

### *Establishing Group Messaging To Support Programming*

Your program team may want to create groups to share amongst themselves or with your program participants.

NOTE: When dealing with our youth, parental permission slips should also include any communications.

The chapter president and program coordinator must be members of these groups.

### *Maintenance*

Members must be given the option to receive group messages. **DO NOT** add anyone to a group without their knowledge or consent.

Group members must have a way to remove themselves from the group.

Only use personal phone numbers to send voice and text messages instead of professional/ work mobile phone numbers.

The chapter president must designate a committee to manage the group messaging service. The group message manager(s) will be responsible for:

- Creating and sending messages.
- Ensuring approval of messages that reflect or are considered official chapter communication.
- Regularly checking member lists for accuracy and removing group members as appropriate.

Recommended Group Message Managers include:

- Corresponding Secretary
- Communications Committee Member
- Technology Committee Member
- Chapter President (if she chooses to do this)

### *Privacy*

The phone numbers of group members **must not** be:

- Used or provided to anyone without the written consent of the group member
- Sold to any person and/or organization; or
- Used for purposes other than receiving notifications/alerts from the chapter.

## **Section 7: Social Media Guidelines**

In today's society, our membership increasingly uses social media networks to communicate. As usage grows, more areas, chapters, and members are utilizing the name of our organization in their exchanges.

New social media networks are created frequently, and existing social media networks often update their features. As a result, this document cannot explicitly list all social media networks or provide guidelines for each of their features.

## Area & Chapter Social Media Accounts

Area and chapters are not required to have social media accounts. However, if an area or chapter chooses to have social media accounts, it must comply with the most current version of this Technology Reference Guide.

Before creating ANY social media account, become familiar with the social media platform's terms and conditions and the privacy policy. These policies should be reviewed often as services periodically make updates.

### Approved Social Media Platforms

Areas and chapters may use the following social media platforms:

Facebook

Instagram

X (formerly known as Twitter)

YouTube

*Note: Evaluation of LinkedIn is in progress*

If there is a NEW social media platform you would like to use, please send your request to the National Technology Committee.

### Content Responsibility

Suppose a designated resource within the area or chapter manages the social media account, and posting this should be reviewed and approved by the respective Area Director and local Chapter President. The Area Director and respective Chapter President will be held responsible for the content of the social media accounts.

### Account Settings

Use the following information, as requested by the individual platform, to complete account profiles for regional/chapter pages.

#### Name

The ***[YOUR AREA or CHAPTER NAME HERE]*** of The Links, Incorporated

#### Username

Platforms may limit usernames to 15-30 characters. If so, an abbreviated form of the chapter name may be used. The Links, Incorporated is never abbreviated.

#### Category

Community Organization or Nonprofit Organization

#### Profile Picture

The OFFICIAL area/chapter logo may be used. This can be downloaded from the National Website.

Brief Description	The official page of the [YOUR AREA/CHAPTER NAME HERE] of The Links, Incorporated.
Long Description	Please enter the official boilerplate information regarding The Links, Incorporated.  The year your area/chapter was chartered and your official name can also be included.
Visibility	The social media account/page must be public.
Contact Information	The mailing address, email address, and/or phone number for the chapter/region must be included
Website	The chapter's/area's website may be included if one exists.  A link to the national website must be provided if the chapter does not have a website.  The chapter/area website (or national website if the chapter doesn't have a website) must be included.
Profanity Filter	Turn on the profanity filter.
Monetization	Areas and chapters may not earn revenue (paid ads, paid subscriptions, etc.) from their social media accounts.

## Section 8: Document Retention

The retention timeframe will depend on the record type. The timeframes will be re-evaluated yearly to determine if adjustments need to be made based on the format and need for each record type.

Item	Retention Period
<b>Finance Reports, Bank Statements</b>	Seven years – shred and delete afterward
<b>Minutes</b>	Lifetime – Archive documents
<b>Chapter Chartering</b>	Lifetime
<b>Audits</b>	Seven years – shred and delete afterward
<b>Chapter Bylaws</b>	Until superseded
<b>Chapter Historian/Archive Reports</b>	Lifetime

## Section 9: Cloud Storage Services

Cloud File Storage Services uses a third-party network of remote servers hosted on the Internet to store and manage data. Cloud file storage services—like Apple iCloud, Google Drive, Dropbox, Amazon Cloud Drive, and others—provide users with a hard drive in the cloud or on the Internet.

Cloud file storage services are accessible, allowing chapters and members to access documents, photos, videos, and any other saved files from any device with an Internet connection. Some cloud file storage services like Google Docs and Dropbox (via Microsoft Online) also allow co-authoring or editing collaboration.

### *Recommended Service Features*

The ideal cloud file storage services should have features that allow you to:

- Upload and save any file you would save on your local hard drive.
- View, edit, and share your content regardless of what computer or device you are using.
- Automatically sync files across all devices.
- Safeguard content through password-protected sharing and file encryption.
- Easily and conveniently navigate the service's interface and tools. Additionally, the selected service should be intuitive and straightforward.

When considering a cloud service, be sure to take into consideration the amount of space available for **free accounts**. Chapters will be accountable for paying for storage that exceeds the free storage limits.

### *Area and Chapter Guidelines*

The following guidelines pertain to areas and chapters electing to use a cloud file storage service to aid in the collaboration and housing of documents.

Like the members-only section of an area or chapter website, this section and any items hosted within must not be accessible to individuals who are not members.

A member of the area's/chapter's leadership team must secure the cloud storage account in the area's/chapter's name using an email account that *transitions from one administration to the next*.

Documents that may be distributed through cloud file storage services include, but are not limited to:

- Chapter and committee meeting minutes
- Chapter Bylaws
- Chapter Manual of Procedures
- Committee reports
- Agenda, etc.

The following documents may be distributed through cloud file storage services, but the documents themselves must also be password-protected:

- Chapter treasurer reports, to include budgets
- Internal Audit Reports
- Financial secretary reports
- Membership directory and/or roster.
- eCommerce Accounts

Information and guidelines specific to Finances are located within the National Finance Manual.

## Section 10: Electronic Voting and Meetings

### Electronic Voting

Chapters electing to use vote electronic technology tools must ensure:

- Only those chapter members present for the meeting during which the election is held receive a ballot;
- Each member is only allowed to cast one ballot per election or run-off;
- The confidentiality of each member's vote is maintained.

### Electronic Meetings

Electronic meetings are authorized for committee meetings only. All monthly chapter meetings must be conducted IN PERSON only unless otherwise directed by the National President.

## Section 11: eCommerce Accounts

The National Finance Committee is the primary authority regarding the area and chapter fiscal operations.

Please see the **Link Financial Handbook** for policies for establishing and using merchant accounts, online business payment accounts (for example, PayPal, Zelle) and online event management solutions (for example, Eventbrite).

### Have Questions?

Send questions about merchant accounts, online payments and fundraising to the National Finance Committee: [finance@linksinc.org](mailto:finance@linksinc.org)

## Section 12: Mobile Applications for Chapter / Area Needs

The information contained in this section applies to all apps owned by an area/chapter (this is optional). However, if an area/chapter chooses to have an app built, it must comply with the following guidelines in this section.

### *App Overview*

The word "app" is an abbreviation for "application." While an app may refer to a program for any hardware platform, it is most often used to describe programs for mobile devices, such as smartphones and tablets.

The typical apps most are familiar with can be found in the [Apple App Store](#) or [Google Play Store](#).

Areas/Chapters may hire an app developer. There is extensive documentation for those wanting to develop [Apple](#) and [Android](#) apps.

### *Developer Account*

A member of the area/chapter leadership must secure the developer account in the area or chapter's name using an email account that transitions from one administration to the next instead of using a second-party developer's or personal account. This ensures that areas/chapters maintain control of the content, including deleting the app from an app marketplace once it is no longer needed or being maintained.

### *Review and Approval*

The Area Director must review and approve information in an app developed specifically for the area.

The Chapter President must review and approve information in an app developed specifically for a Chapter.

### *Contact Information*

Apps must include contact information for the area/chapter, including the specific area/chapter name, mailing address, and/or email address.

### *Disclaimer*

Apps must contain the following statement, verbatim (will require legal review and sign-off)

This app is the sole property and responsibility of the [YOUR AREA/CHAPTER NAME HERE] of The Links, Incorporated. The Links, Incorporated, is not responsible for data usage fees through this app. *Note: This should also be used for any broad text messages that are sent.*

### *Security*

Each user should have a unique userid and password for accessing the information on the app.

### *User Privacy*

Apps should access only the information on the user's device necessary for the app's functionality.

### *Monetization*

Areas/Chapters must not monetize an app using paid advertisements, in-app purchases, or subscriptions.

### *Advertisements*

Areas/Chapters are discouraged from using free app platforms/frameworks that provide automatic advertising in the app.

### *App Store Metadata*

This information must be completed to describe the developed app, NOT the area/chapter.

### *App Icon*

An app-specific icon or area/chapter official logo must be used as the graphic to avoid confusion with any apps that the National organization may choose to create in the future.

# ACKNOWLEDGEMENTS

**National President**

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## Revision History

This provides the last three revisions of this document and changes made.

<i>September 1st, 2023</i>	<i>Original Document</i>
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