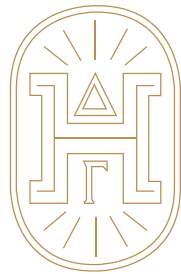




Advisory Team Handbook



Revised September 2020



“The objects of this Fraternity shall be to foster high ideals of friendship among women, to promote their educational and cultural interests, to create in them a true sense of social responsibility, and to develop in them the best qualities of character.”

Article II of the Delta Gamma Constitution



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INTRODUCTION

Delta Gamma is very fortunate to have many alumnae who are dedicated to the continued success of the Fraternity. Serving on local advisory boards is a great way to stay connected to the purpose of the Fraternity and to develop new friendships with other alumnae members while participating in the development of college women.

This Advisory Board Handbook exists to provide the tools and resources needed to support advisers as they empower today's college women. Within it, you will learn information about your own role as a collegiate chapter adviser, roles of fellow DG volunteers and effective ways to communicate with and mentor collegians.

The skills that women learn in college will be carried with them for years to come. The opportunity to make an impact is immense; by serving as an adviser, you will help our members develop into strong leaders. Thank you for your dedication both to Delta Gamma and to the future success of our members!

ADVISORY BOARD FOUNDATIONAL INFORMATION

Each collegiate chapter has a board of volunteers that serve as advisers. These advisers provide guidance and advice on finance, membership recruitment, accountability, risk prevention and all other areas of chapter programming and operations. They communicate regularly with chapter officers and make themselves available to all members of the chapter. Advisers help the chapter plan and implement officer transitions. They know and support the policies and procedures of the Fraternity in an equitable and positive manner.

Advising Philosophy

In order to effectively advise students, Delta Gamma believes:

“Advisers give a collegiate chapter the support they need to accomplish their goals, reach their potential, live their values and see their vision fulfilled. They provide continuity, guard our heritage, refine our present and inspire our future. Each serves a key role in the success of a chapter by being a coach and educator while ensuring procedures and policy are followed.”

This philosophy guides us in understanding that, as advisers, volunteers should be serving more as a coach than a trainer. Alumnae can provide valuable guidance that helps students get to the answers on their own, while also looking out for them from a place of care.

Advisers Policy

The Delta Gamma [Adviser Policy](#) provides guidelines regarding volunteers that work with Delta Gamma collegiate chapters. It addresses rules for appointment, eligibility and terms of collegiate chapter advisers.

Adviser Position Descriptions

Collegiate chapter adviser position descriptions can be found in the [Fraternity & Foundation Volunteer Position Description Handbook](#). Position descriptions detail responsibilities of each volunteer role, key relationships and expectations around participation in various meetings, programs and events. Advisers are encouraged to review not only their own position description, but also that of the other team members so that they can be familiar with where their roles intersect and identify areas of collaboration. For those who supervise other volunteers, special attention should be paid to the position descriptions of the roles that fall within their area.

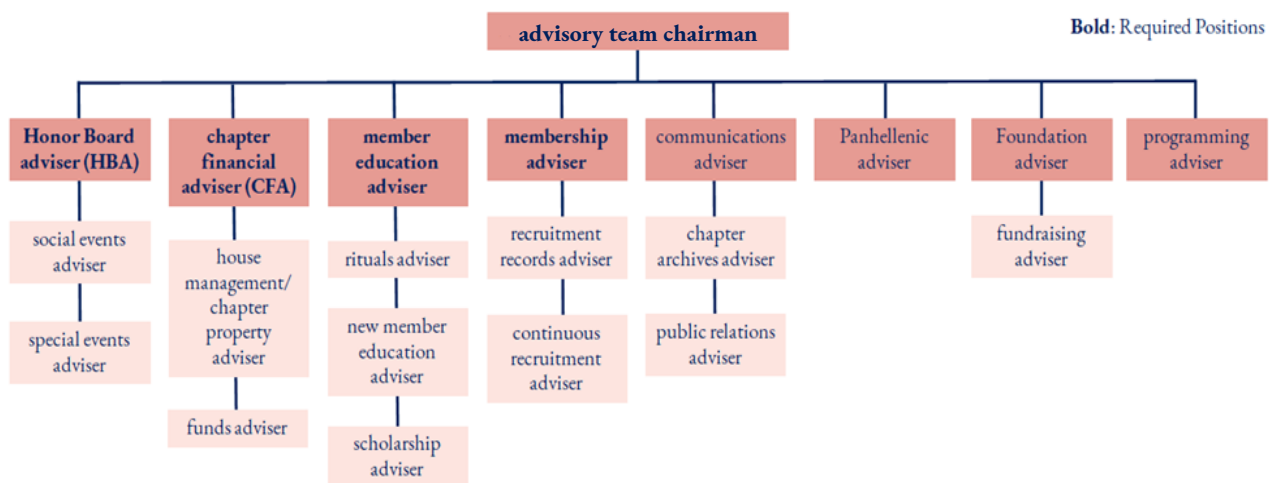
Required Adviser Positions

Each Delta Gamma collegiate chapter advisory team must have an advisory team chairman (ATC), Honor Board adviser (HBA), chapter financial adviser (CFA), member education adviser and membership adviser.

Additional Adviser Positions

Beyond the required adviser positions, there are many other volunteer roles that support collegiate chapters. Delta Gamma expects that qualified volunteers are appointed to volunteer roles. As such, if any of these roles are available, ATCs should strive to fill them with interested volunteers. Where possible, each role should be held by a unique volunteer rather than volunteers holding more than one role. Chapters may also utilize custom chapter adviser positions to fit any specific needs they have but should not seek to add these custom roles to their teams until all other roles are filled.

Advisory Team Organizational Chart



Collegiate Chapter Organization Structure

There are four board structures within collegiate chapters that play important support roles in the efficiency of chapter operations. These groups are the chapter management team (CMT), Honor Board, the advisory team and the house corporation board. All members and new members should have a comprehensive understanding of the responsibilities of each board. Additionally, it is essential that the members of all four entities are well-versed in the function and interactions of the others. The collaboration between these entities is vital. Refer to [Delta Gamma Fraternity Constitution](#), Article XVI for more information.

Function

The [Collegiate Chapter Officers Manual \(CCOM\)](#) is an essential resource for all members of the advisory team in understanding how a collegiate chapter operates.

EXPECTATIONS OF ALL ADVISERS

Become Familiar with Governing Documents

Our [Fraternity Constitution](#) is a public document on file at the Library of Congress. It is on the members-only side of the DG website and may be shared with non-members upon request. You can access the Constitution in the Barbara Nussa Boersma Library.

The Fraternity Constitution outlines the more formal and permanent structure of Delta Gamma Fraternity, an organization incorporated in the state of Ohio. The Constitution may be amended at Convention following the procedures outlined within it. There are no bylaws in the Fraternity Constitution.

Requirements described in the Constitution may not be waived or altered except by amendment. Council is given the authority (after consultation with the Fraternity Constitution and Elections Chairman) to initiate or waive a *policy* that further defines a Constitution directive.

Fraternity handbooks and resources, available in the [Barbara Nussa Boersma Library](#), guide the implementation of Fraternity Policies and Procedures. These [policies](#) and [procedures](#) are designed to assist in the coordination and execution of a chapter's business operation. As an adviser, it is important to both become familiar with these policies, procedures and processes, and to follow them.

This summary of the Fraternity Constitution is for informational purposes only and should not be used as a final reading for interpretation in constitutional matters.

Article I: Name

- Delta Gamma Fraternity

Article II: Objects

- Foster high ideals
- Promote educational and cultural interests
- Create a true sense of social responsibility
- Develop the best qualities of character

Article III: Structure

- Collegiate chapters
- Alumnae chapters, Associations, authorized groups
- Unaffiliated members
- Chapters, associations and authorized groups are grouped geographically in regions

Article IV: Definition of Membership

- Membership shall consist entirely of women
- Must be a person of good character and standing and meet one of the following qualifications:

- registered in a course leading to a bachelor's degree
- be a non-collegiate member of a group chartered by petition
- an alumna initiate of a petitioning or colonizing group
- demonstrate a significant relationship with DG and a desire to fulfill a special role in support of a collegiate chapter or alumnae chapter or association
- After joining Delta Gamma (initiated) no member shall become an initiated member of any other NPC group. No initiated member of another NPC group shall be offered membership in Delta Gamma Fraternity. (Includes women who have resigned, transferred or been expelled)
- Classification of Membership
 - collegiate members (chapter members and unmarried undergraduate members who have transferred to an institution where there is a DG chapter)
 - alumnae members

Article V: Selection of Members

- Collegiate Members – Eligibility for pledging
 - Registered as a student
 - Signed Recommendation Form
 - Approved by chapter
 - “C” average from college or 2.5 on 4.0 scale from secondary school
- Eligibility for Initiation
 - Pledged in accordance with the Constitution
 - Financially Current
 - Registered in college or university where she is to be initiated
 - “C” average from college or 2.5 on 4.0 scale from secondary school
 - $\frac{3}{4}$ vote of chapter membership
- Selection of Alumnae Initiates
 - Non-collegiate members initiated by a collegiate chapter with Council approval

Article VI: Fees, Dues and Assessments

- Annual published fee schedule
- Annual adjustments not to exceed 8% without a Fraternity membership vote
- Financial Policies directed by Council
- Convention and *Anchora* shall be budgeted for as mandated by the Constitution Articles VIII and XXII.
- Charter Fees to cover chapter installation costs
- Each new member shall pay a new member fee, an initiation fee and per capita dues
- Collegiate and alumnae chapters, associations and unaffiliated collegiate members shall pay annual per capita dues (50-year members are not required to pay per capita dues)

Article VII: Termination of Membership

- Council may accept a resignation
- Only Council may expel a member
- Reinstatement: a member who has resigned may request a one-time reinstatement in accordance with Fraternity policy

Article VIII: Convention

- Biennial meeting known as Convention
- Official Membership of Convention
 - One delegate from each collegiate and alumnae chapter, members of Council, the Executive Director, Regional Officers, NPC Delegate(s), Chairmen and Directors designated by Council.
- Distribution of Votes: a ratio for assigning equally weighted vote values for collegiate chapters in relation to alumnae chapters and other official voting members shall be determined
- Delegates must be in Good Standing to vote

Article IX: Officers and Duties

- Officers: There shall be 7 elected officers of the Fraternity (Council) consisting of President and six Council Trustees: Collegians, Alumnae, Fraternity Programming, Membership, Communications and a Fraternity Treasurer.

Article X: Election, Term, and Vacancies

- Nominating Committee: 8 members (preferably Council/Cabinet experience)
- Term Limits of Nom Com: may not serve on two consecutive committees
- Nominations by members: following presentation of Nominating Committee's slate, any (2) members may submit a nomination by filing required forms. There are no nominations from the floor of the Convention.
- Election/Term: election takes place at Convention. Elected officer serves no more than 4 terms (2 years/term) on Council. Elected officer serves no more than (2) terms in the same office.
- NPC Delegate is appointed by Council

Article XI: Board of Directors: Council

- Board of Directors of Delta Gamma and Council are one and the same body and have the same powers.
- Appointment of Cabinet
- Council shall meet (at least) semi-annually

Article XII: Executive Offices

- Executive Offices under the supervision of the Executive Director appointed annually.

Article XIII: Fraternity Funds

- General Operating Fund – derived from gross receipts. Expenditures from this fund shall cover the operating expenses of the Fraternity.
- Set Aside Fund – shall consist of the net investment of various funds which is set aside annually by action of Council in accordance with IRS Code Section

512(a)(3)(B) for qualifying purposes such as scholarships, student loans, loans on local chapter houses, leadership and citizenship schools and services and other qualifying educational and charitable activities.

- Fund Expenditures- Constitution does not allow *deficit* budgeting

Article XIV: Granting of Charters

- After due investigation, Council may grant a charter provided the following procedures are followed:
 - Convention body has approved a field for expansion or
 - Favorable Investigation of institution as a field for expansion
 - Majority vote of the (5) nearest alumnae and (5) nearest collegiate chapters
- Formation of collegiate chapters
 - Colonization is the selection and organization of a group of students, which will form the nucleus of a new collegiate chapter. Council determines the selection process following procedures set forth in Article V.
- Charters of alumnae chapters and certificates of alumnae associations
 - Council may grant a charter to an alumnae chapter to 20 or more petitioning alumnae members. An alumnae association of 10 or more members maybe certified. Alumnae chapters and Associations are designated by the name of the city or area they are located in

Article XV: Withdrawal, Relinquishment, and Suspension of Charters

- Charter of a collegiate chapter – with the unanimous affirmative vote of Council, subject to provisions stated, charters of collegiate chapters maybe relinquished, withdrawn or suspended for any of the following reasons:
 - College administration requests chapter be withdrawn from campus
 - College in which chapter is located no longer meets the requirements of the NPC or Delta Gamma Fraternity
 - Chapter fails to comply with the requirements of the Constitution, policies and procedures of the Fraternity or if general conditions of chapter are below the standards of the Fraternity and all efforts to improve conditions have proved to no avail, or if it appears the best interests of the Fraternity will be served with the removal of the charter
- Notification – Sixty (60) days in advance of Council vote, collegiate chapter is notified. Any collegiate or alumna member may submit a written summary of the reason against the proposed action
- Assets upon termination – Upon withdrawal, net assets of collegiate chapter are returned to the Fraternity
- Charter of an alumnae chapter and certification of an alumnae association
 - Withdrawal of charter if alumnae chapter/association fails to meet its financial obligations for a (2) year period or fails to file reports or fails to comply with Article XVII (meeting requirements, Bylaws, etc.)
 - Assets of alumnae chapter/association are transferred to Fraternity upon relinquishment

Article XVI: Collegiate Chapters

- Membership-Every unmarried undergraduate member of the Fraternity, taking work leading to a degree in the institution where her chapter is located shall be a member of that chapter.
 - Council may grant exceptions under extreme circumstances (Early Alumna Status)
 - Only Delta Gammas who are students in the institution where the chapter is located maybe members of that chapter
 - Married and/or graduate members, registered in the institution where the chapter is located, maybe members of that chapter
- Officers – president and other officers provided in BL
 - nomination/election of officers follow procedures outlined
 - collegiate chapter finance records are audited annually
 - hold a weekly meeting during the academic year
 - must have approved BL/SR (approved by RCS/CAC)
 - Advisory Team appointed (ATC appointed by RD)

Article XVII: Scholarship

- Regulations for members- A member whose scholastic average falls below “C” at the end of the semester or quarter, may not hold office or vote in chapter meeting (except Vote to Initiate) until she has regained a “C” average. A higher GPA for good standing maybe required with the approval of the RCS. Must be documented in BL/SR.
 - Chapter not in good scholastic standing (defined by Council) may be deprived of its vote at Convention
 - Chapter whose scholastic average is below a “C” for a period covered by (2) consecutive Conventions, may be deprived of its charter.

Article XVIII: Alumnae Chapters and Associations

- Membership: any alumna member in good standing shall be eligible for membership in any alumnae chapter or association
 - Officers: president and other officers provided in Bylaws
 - Nomination and election of officers follow procedures outlined
 - Alumnae chapter holds 6 meetings/year
 - Associations: meetings specified by its Bylaws
 - Bylaws: approved by RAS (Regional Alumnae Specialist)
 - House Corporation: Alumnae responsible for formation

Article XIX: Regions

- Definition: a region shall be a geographical grouping of collegiate and alumnae chapter and associations
 - Regional Officers and duties assigned by Council
 - Regional collegiate officers shall have supervision of collegiate chapters and any unaffiliated collegiate members attending a college in which there is a chapter of Delta Gamma
 - Regional alumnae officers shall be responsible for the advancement of alumnae activity and the interest of the alumnae

Article XX: House Corporations

- House Corporation for each collegiate chapter or where a new collegiate chapter is anticipated. Alumnae chapter or association in the community of the chapter is responsible for the formation of such corporation.
- Dissolution – charter withdrawn or relinquished – net assets returned to the Fraternity and held for (ten) years without interest in the event chapter is reestablished

Article XXI: Insignia

- Trademark: the design or representation of the Badge, Crest, Greek letters, and Name or other trademarks of the Fraternity cannot be created or produced, used, offered for sale by any person or company without authorization or approval.
- Badge: gold anchor with gold cable, cross bar shall display the Greek letters Tau Delta Eta in gold on white enamel and above the flukes of anchor shall be white enamel shield bearing in gold the Greek letters Delta Gamma. Only members of the Fraternity shall wear the badge.
- Pledge Pin: white enameled shield bearing the Greek letters Pi Alpha in gold
Crest- colors in the crest are: cream color for the rose at the apex of the crest, gold for the three (3) five pointed stars on the shield, the rope around the shield, and the outline of the scroll ribbon; burnt maize for the flanking ornaments of the rose and Greek letters Tau Delta Eta; rose pink for the two Greek letters Delta Gamma on the shield; blue for the lower two-thirds of the shield; and green for the upper third and center section of the shield and leaves of the rose. Only members of the Fraternity shall use the crest.
- Flower: Cream colored rose
- Colors: Bronze, Pink and Blue
- Seal /Call: [see online here](#)

Article XXII: The ANCHORA

- The official organ of the Fraternity is a journal called the *Anchora*. Each member of the Fraternity upon Initiation shall receive a lifetime subscription

Article XXIII: Founders Day

- March 15 or nearest convenient date shall be designated each year as Founders Day

Article XXIV: Parliamentary Authority

- Current parliamentary writings of General Henry M. Robert shall be the authority in all cases not otherwise covered in this Constitution

Article XXV: Amendments

- Articles of Incorporation and Constitution can be amended by 2/3 vote at Convention with notice
- Articles of Incorporation and Constitution can be amended by Unanimous vote provided the amendment has been read at the preceding meeting of that Convention.
- Amendment by Mail: Articles of Incorporation and Constitution may be

amended between Conventions by mail provided the procedure outlined is followed

Article XXVI: Indemnification

- Any person who is or was made or threatened to be made a party to any legal proceeding by reason of the fact that he or she is or was a Director, Officer, agent or employee of the Fraternity, or is or was serving at the request of the Fraternity as a director, officer, employee or agent of another corporation, partnership, joint venture, trust or other enterprise, shall be indemnified by the Fraternity to the maximum extent authorized under the laws of the State of Ohio.

Collegiate Chapter Bylaws and Standing Rules

While collegiate chapters are governed by the Fraternity Constitution, they also operate under the guidance of their chapter's bylaws and standing rules. You should also familiarize yourself with the content of this resource which can be accessed in [Anchorbase](#) under Chapter Management > Communications > Reports > Bylaws and Standing Rules.

Understand Our Purpose

Every Delta Gamma is responsible for striving to live-out Article II of the Fraternity Constitution. Article II defines the purpose of Delta Gamma and operates as our mission statement.

The objects of this Fraternity shall be to foster high ideals of friendship among women, to promote their educational and cultural interests, to create in them a true sense of social responsibility and to develop in them the best qualities of character.

Remain in Good Standing

Update Your Contact Information

We expect all volunteers to maintain up-to-date contact information with the Fraternity, including phone number, email and mailing address. This can be done by logging into the [detagamma.org](#) website and selecting "[Profile](#)" from the blue drop down menu.

Pay Your Dues

In serving as a volunteer for Delta Gamma, we know you believe in our sisterhood, the experience and the impact that membership has on the lives of women. Paying per capita dues supports Fraternity initiatives, programs and events. The expectation around the payment of per capita dues is outlined in the Constitution. As members, we made a promise to uphold the expectations of membership during our Initiation.

Per capita and local dues can be paid by logging into the [detagamma.org](#) website and selecting "[Pay Alumnae Per Capita & Local Dues](#)" from the blue drop down menu.

Educate Yourself on Delta Gamma's Diversity, Equity & Inclusion Efforts

We expect all volunteers to be aware of the organization's commitment to diversity, equity and inclusion (DEI) and be prepared to support future implementation of policies and practices to create a more equitable sisterhood. That means living by Delta Gamma's stated values and positional statement on inclusivity, being aware of where DEI resources can be found and actively supporting chapters in creating more open and welcoming spaces for all. Here are a few ways you can get started:

- Reference the [Diversity, Equity & Inclusion](#) page of the website to familiarize yourself with the organization's efforts and current initiatives and pay particular attention to the section about how to support women who have been victims of covert or overt racism; your role as an adviser is to listen and respond thoughtfully, and this guide will help you become aware of how to be helpful in these difficult situations.
- Review the [Positional Statement on Inclusivity](#) and share it with other advisers and chapter members.
- Work with chapter Honor Board members to understand how they can [address racism through the Honor Board process](#).
- Take time to watch the recordings of DEI-focused webinars about [implicit bias](#), [white privilege](#), [microaggressions](#), and [social class](#). Determine how you can implement these into CMT meetings or chapter-wide discussions.

Social Media Expectations

Social media is a constantly growing method of communication, activism and connection for our collegiate members. Sometimes it seems that new social media outlets are popping up by the day. We encourage advisers to stay abreast of new social media trends and follow the chapters accounts they advise on whichever social media channels they have.

Review Delta Gamma's [social media policy](#) and our [social media policy FAQ](#). Keep in mind that, as you work with more advisers and collegiate members, you will have more eyes on your social media accounts. Be sure that what you say to collegians and what you share on your personal social media are in alignment, and that you are being respectful of all the individuals who may see your posts. While Delta Gamma does not oversee volunteers' personal social media accounts, it is still important to live our values on those platforms in order to be the best sisters and role models for collegiate women.

FRATERNITY AND FOUNDATION STRUCTURE

Many volunteers work collaboratively to ensure a positive membership experience for our collegiate chapters.

Local Alumnae

Alumnae Groups

Your local alumnae group can assist you in reaching out to alumnae when recruiting advisers for your team, finding support for collegiate events like recruitment and co-planning collumnae events with the collegiate director of alumnae relations. If you are unsure who the contact person is for your local alumnae chapter or association, check out the [chapter locator](#) on the Delta Gamma website.

House Corporation Boards

House corporation boards serve as the landlord, employer and holder of the insurance for the chapter and itself. It is usually a not-for-profit corporation incorporated in the state or province in which the chapter is located. It can also be a Limited Liability Company (LLC). It holds and protects the assets of the chapter. All house corporations share a common goal: to provide a suitable social environment for the chapter, whether they own or rent a house, lodge, suite or other accommodation.

In addition to alumnae members, the chapter's president, vp: finance and director of house management serve on house corporation. The ATC also attends house corporation meetings as a voting member. The house corporation—not the chapter directly— maintains the chapter house and employs its staff.

Not all chapters have a house corporation board. If your chapter does, a list of your house corporation board officers can be found in [Anchorbase](#) under Roster > Reports > House Corporation Officer Roster.

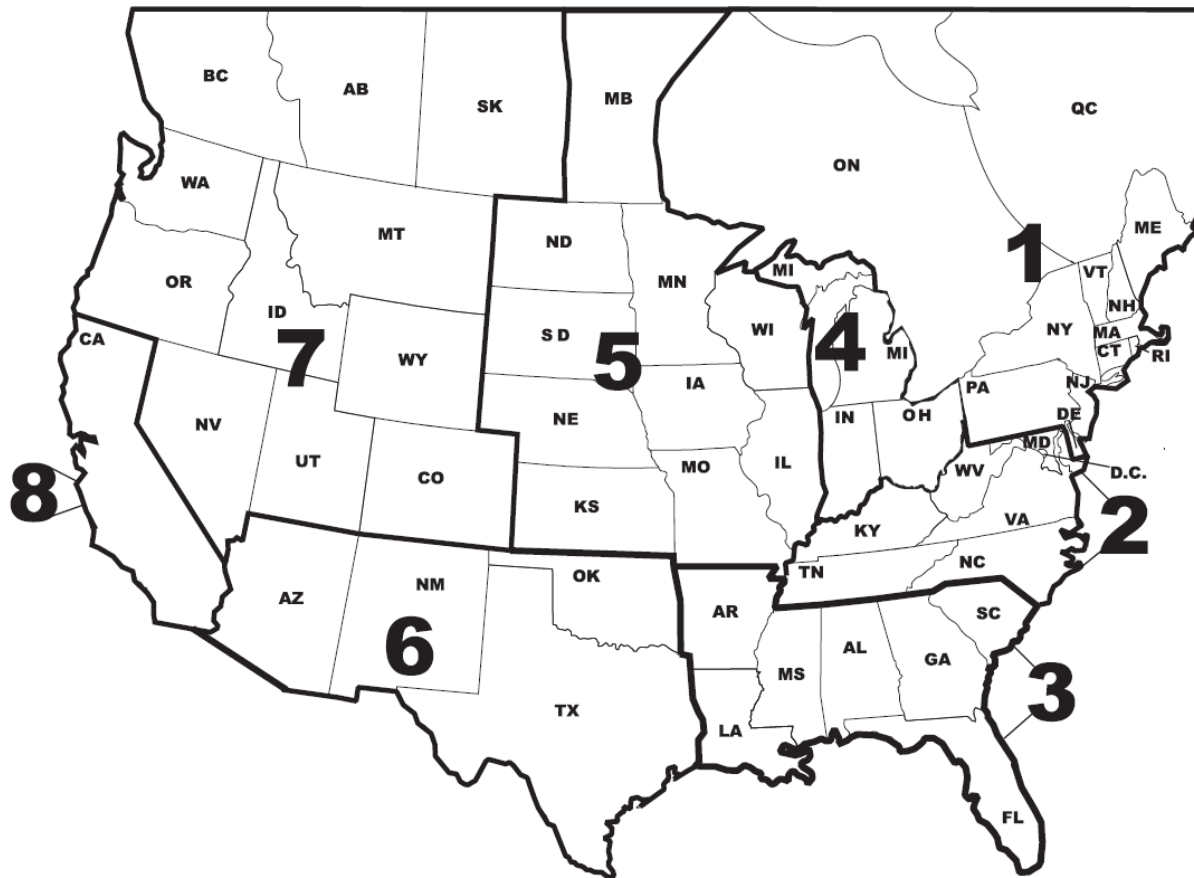
Regional Team

The Fraternity is organized into eight different geographic regions and a ninth region for newly established chapters. The eight (8) regional teams are led by the Regional Director (RD) and are made up of the following volunteers:

- Panhellenic Support Specialist (PSS)
- Regional Alumnae Specialists (RAS)
- Regional Collegiate Recruitment Specialist (RCRS)
- Regional Collegiate Specialists (RCS)
- Regional Foundation Coordinator (RFNC)
- Regional Finance Specialist (RFS)
- Regional Housing Specialist (RHS)

Occasionally, chapters who need general operations support may be assigned a Council Appointed Coordinator (CAC) or a Collegiate Recruitment Consultant (CRC) for those needing extra recruitment support. Those positions are also considered to be a part of the regional team.

The map below identifies the region in which the chapter you advise resides.



The New Chapter Region includes chapters that are in their first few years of installation after receiving their charter. Once removed from the New Chapter Region, they will join their geographical region. The New Chapter Region is led by the Director: New Chapter Development and is structured a bit differently than our other eight (8) regions. While all chapters in the New Chapter Region share the support of the New Chapter Finance Coordinator (NCFC), they each have their own New Chapter Coordinator (NCC) and New Chapter Recruitment Coordinator (NCRC). When it comes to Foundation or Panhellenic matters, chapters within the New Chapter Region receive support from the RFNC or PSS for the region in which they are geographically located.

A list of your regional team members can be found in Anchorbase under Roster > Reports > Regional Team Roster.

Fraternity & Foundation Directors

Directors are Council-appointed and report to respective Council members. Similarly, the Foundation has Directors that are appointed by the Board of Trustees who report directly to them. These directors are subject matter experts in areas such as finance, housing, recruitment, alumnae, programming. The [Delta Gamma Leadership Contact Directory](#), which can be found in the Barbara Nussa Boersma

Library on the Delta Gamma website, lists the email contact information for Fraternity Directors.

Executive Offices Staff

Executive Offices (EO) serves as Delta Gamma's international headquarters. There is no such thing as Delta Gamma "Nationals." Delta Gamma has collegiate chapters and alumnae groups outside the U.S.—we're international! EO is located at 3250 Riverside Drive, P.O. Box 21397, Columbus, OH 43221-0397. EO is open Monday through Friday from 8:30 a.m. - 5 p.m. Eastern Time. You can contact EO using the general email DG-EO@deltagamma.org or by calling (614) 481-8169.

Various Executive Offices staff are resources for you. The Executive Offices Staff Directory provides the names and contact information for staff members who work with each region. The [Delta Gamma Leadership Contact Directory](#), which can be found in the Barbara Nussa Boersma Library on the Delta Gamma website, lists the email contact information for staff.

Collegiate Development Consultant (CDC)

A CDC is a recent college graduate who is a paid, fully trained staff member. They visit collegiate Delta Gamma chapters across the United States and Canada and provide leadership development, education and guidance. CDCs also assist with establishing new Delta Gamma chapters as the primary on-campus resource for the organization.

Collegiate Development Specialist (CDS)

CDSs are the staff members that respond to daily chapter operation concerns within their assigned regions. This includes roster changes, Initiation authorizations, crisis response and overall, acts as a point of contact within EO for chapter leaders and regional team volunteers. They are the main liaisons between the Fraternity and the colleges/universities

Collegiate Finance Consultant (CFC)

This team is responsible for providing accurate and timely information regarding financial affairs, including revenue collection and distribution of funds, budgeting and financial reporting. This team provides financial services to collegiate chapters.

Office of Housing (OOH)

The Office of Housing processes payroll, accounts payable and receivable, state and federal taxes, and most things finance-related for all Delta Gamma house corporations. This group supports our alumnae housing volunteers and helps our collegiate chapters maintain a safe living environment and a house that is competitive during recruitment. This office also provides loans, budget expertise, human resource guidance, project management, financial analysis and set-aside advice for our house corporations.

HONOR BOARD

Honor Board is a safe and confidential venue in which collegiate members and the chapter can grow through values-based conversations. Honor Board can be used to assess morale, engage in member accountability and serve as a sounding board for members to voice their needs and/or concerns. The vp: social standards chairs the chapter's Honor Board. The chapter president, sophomore member, junior member and member-at-large also sit on Honor Board. The Honor Board adviser also attends Honor Board meetings. All Honor Board proceedings are kept strictly confidential. Any member may come into any Honor Board meeting to discuss private chapter matters—both positive and negative.

As an adviser, you play a critical role in mentoring chapter officers and members on how best to utilize Honor Board and live Delta Gamma values in a safe space, while following the proper procedures and adhering to strict confidentiality. A synopsis is below, but please reference the [Honor Board Handbook](#) for additional information.

Roles and Expectations

The Fraternity encourages the division between the advisory team chairman (ATC) and the Honor Board adviser (HBA). Assigning the ATC and HBA roles to two different alumnae allows for the division of two very heavy workloads – one adviser can focus on Honor Board and another on building and fostering a robust advisory team. Understanding the different roles and expectations for each is key to a successful working relationship.

By attending your respective weekly Honor Board (HB) and chapter management team (CMT) meetings, each adviser will gain an intimate understanding of the chapter, the morale and its members. Depending on the topic, each adviser may develop similar or different perspectives. Understanding each adviser's specific responsibilities coupled with effective communication and trust in each other are the keys to a successful ATC and HBA pair. (Please note, this does not mean all advisers should attend all Honor Board meetings. Rather, the HBA should be communicating necessary information that does not breach confidentiality to the advisory team.)

For example, a collegiate chapter member might approach the adviser they know best or an adviser they encounter first to discuss a concern. While open dialogue and approachability needs to be encouraged, it is important for every adviser to direct the collegian to Honor Board or the Honor Board adviser in resolving matters relating to the Statement of Obligation and to refrain from weighing in on the matter.

Sharing Information

Honor Board is confidential, but not secretive. It is important to understand what information can and should be shared, and what information must be kept confidential.

When sharing information, it is important for HB to understand what can and cannot be shared with other officers and their advisers.

The ATC and advisory team need to be kept apprised of the members and new members who are not in good standing. There are procedural purposes for consistent information sharing (for example, eligibility for chapter votes). A clear understanding of the chapter’s membership standings enables the advisory team to tailor their support and guidance in their respective areas around the needs of the chapter.

| What to Share | What Not to Share |
|---|--|
| An updated list of members in poor standing is to be shared by the HBA with the ATC following weekly Honor Board meetings via the HBA Weekly Activity Log form (refer to the Honor Board Handbook). | Confidentiality in Honor Board must be upheld at all times. The lines of confidentiality extend to the general chapter, CMT, advisory team and regional team. Any detail surrounding the Statement of Obligation Review, the formal hearing and the hearing outcome cannot be shared outside of Honor Board. |

Dates when updated information is particularly important include:

- Chapter votes with the exception of Vote to Initiate (e.g., BLSR, budget, elections, recruitment, etc.).
- Roster-related updates (e.g., transfer forms, Early Alumnae Status requests, etc.).
- Writing recommendations for Foundation scholarships or fellowships.
- Attendance for social events.
- Verification of member standing during Slating, Elections and Transition (SET)

The Supporting Role of the Advisory Team on Honor Board

chapter financial adviser (CFA)

The chapter financial adviser (CFA) supports the vp: finance through the delinquent payments process and ensures that APNs are filed accordingly.

member education adviser

The HBA and member education adviser support the vp: member education in developing education and programming to address morale and in determining portions of the new member program to be repeated during the delay of Initiation.

scholarship adviser

The scholarship adviser supports the director of scholarship to ensure that APNs are filed accordingly. The scholarship adviser supports the director of scholarship to ensure that the scholarship plan is being executed and that members in poor academic standing are receiving appropriate attention.

communications adviser

The communications adviser supports the vp: communications to ensure that attendance is being tracked and that APNs are being filed accordingly. When

changes are required to the membership roster, the communications adviser supports the vp: communications to ensure that changes are reported to the collegiate development specialist (CDS) at Executive Offices.

Sharing Trends

HB is the heart of the chapter and an important liaison with CMT. In this capacity, examples of topics that HB should share with CMT are:

- Patterns that suggest a cultural problem, risky behaviors or a challenge within the chapter.
- Ideas for programming for the chapter or a retreat activity.

To help facilitate this conversation between HB and CMT, be sure to utilize the agenda items from the weekly HB meeting to identify any items for HB to raise with CMT. Remember to discuss trends, morale, positive programming, etc., but not details from hearings, SOR reviews or details of specific conversations with a member.

The Chapter President

The president sits on HB, CMT, Nominating Committee and the Evaluating Committee (EVC). As such, the ATC should rely on the president to apply her unique perspectives and any relevant HB information in each of these situations.

Frequently Asked Questions (FAQs)

“Sign Here.” Not sure which adviser should sign?

The Fraternity Director: Standards updates the various forms in the online library. If you come across a form where it is not clear whether the ATC or HBA should sign, please send the form to the Director: Standards (standards@deltagamma.org).

Can other advisers attend formal hearings?

No. The Honor Board adviser is the only adviser who can attend a formal hearing. If the HBA cannot attend a formal hearing, they should contact the Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) prior to the hearing to discuss alternative options.

Can other advisers attend HB when there is not a formal hearing?

For example, chapter morale has been low and retreat is coming up, can the programming adviser attend HB to discuss chapter morale? Another example may be: the director of scholarship has concerns about the recent drop in chapter’s average GPA, and would like to discuss the chapter’s attitude towards academics; can the scholarship adviser attend this discussion as well?

Any adviser, officer or chapter member may request to attend an Honor Board meeting. Honor Board should be sharing standards trends with CMT as they emerge. The advisers may request an update from Honor Board as it pertains to their advisory area, when needed.

After a chapter member went to HB, the parent calls the ATC upset about her daughter being on probation, removed from office, recommended for expulsion,

not being allowed to run for office, etc. I didn't attend the meeting and don't know any of the details. How do ATCs handle this?

All Honor Board matters are confidential. We cannot discuss anything Honor Board-related with a parent, we can only discuss with the member. An adviser should refer parental inquiries to Executive Offices (EO).

I'm the HBA and I think there's a case that's going to go to formal hearing and I would appreciate being able to talk through some of my thoughts with the ATC, can I?

No, this would breach confidentiality. Your RCS/CAC/NCC or the Director: Standards are both available to discuss any Honor Board-related issues.

During recruitment, I noticed some members telling others how they should vote or other behavior that HB should address. As the ATC, can I talk to the HBA about what I observed?

Yes, any and all concerns or issues that may be relevant to Honor Board should be flagged with the HBA. Examples that arise during recruitment, likely also need to be addressed by EVC. Encourage EVC to discuss the matter, address during recruitment as appropriate and for EVC to follow up with HB as well.

A member came into HB to discuss their plans to transfer to a different school. While HB met with the member, the ATC needs to sign the transfer paperwork. What can the HBA and ATC discuss?

If the ATC has questions relating to Honor Board, she should reach out directly to the HBA and RCS/CAC/NCC.

As the ATC going into Nominating Committee and the SET process, I am to approve whether or not a member is eligible for office. How do I know whether to approve candidates if I don't sit in on Honor Board and the HBA and I don't discuss SORs and APNs? How can I best determine whether a candidate is eligible?

The vp: social standards sits on Nominating Committee so that Honor Board-related issues (including standard and automatic probation) can be weighed during the slating process. The ATC may also reference the HBA Activity Log to verify if a member is in good standing.

What can be shared during the transition process between incoming and outgoing HBAs?

The outgoing HBA may share any and all information regarding previous and ongoing Honor Board cases for members currently on probation with the incoming HBA during transition process. She may also share any past Activity Logs and HBA Activity Logs.

I still have a question that isn't answered here. Where can I go for help?

Please contact your RCS/CAC/NCC for additional help. If you have an idea for an item to add to this list, please email the Director: Standards (standards@deltagamma.org).

FINANCE FOR ALL ADVISERS

Finance is an important foundation for all the activities that a chapter will do throughout the year. It is essential that every officer on CMT know their budget and a little bit about finance. As such, a broad understanding of finance knowledge is essential for each adviser, no matter which area you advise. The [Collegiate Finance Handbook](#) is referenced throughout this section and should be reviewed for more information on each of these topics.

Chapter Budgets

The chapter operates under a fiscal year, which is from July 1 to June 30. The vp: finance, together with chapter management team (CMT), the chapter financial adviser (CFA)/advisory team chairman (ATC), the Regional Finance Specialist/New Chapter Finance Coordinator (RFS/NCFC) and Executive Offices (EO), create the chapter budget that is voted on by the chapter before the chapter leaves for summer. To properly plan the budget, each chapter needs to start the budgeting process in early spring by asking each officer for budget requests. Each of the CMT officers provides input to their respective budget areas. During the budget planning period, vice presidents should discuss their ideas for the coming year with their advisers.

Once the budget is prepared, the vp: finance must submit the budget to her RFS/NCFC for approval. Once the RFS/NCFC approves, the vp: finance then presents the budget to the chapter to vote to approve. The vote details are included in the chapter minutes. This must be completed before leaving for summer break. If not, then the proposed budget produced by Executive Offices is put into implementation for the upcoming fiscal year.

Budget for the Officer You Advise

At the beginning of her term, each officer/director/chairperson with fiscal responsibilities (e.g. Anchor Splash®) signs a contract to adhere to her budget (please see the Collegiate Finance Handbook section on officer contracts). Directors do not have budgets of their own, but rather, fall under the vice president's budget. Each adviser should know the budget for the area she advises.

Make sure directors, committee members and others seek approval for purchases before making them. In order for them to be reimbursed, their vp must authorize the reimbursement form, acknowledging approval for the expense and the fact that the expense will be subtracted from that vice president's budget. Each officer is responsible for keeping expenses within their budgets. The chapter is not obligated to reimburse the officer/director/chairperson for over-budget purchases, provided the officer/director/chairperson has a current signed Officer Budget Contract on file on greekbill.

If unforeseen circumstances threaten to cause an officer to go over budget for an event/purchase, she **must** discuss the issue with the vp: finance before making any

purchases. The vp: finance should discuss the situation with the CFA, ATC or RFS/NCFC.

For more details on budgets, please see the Budget section in the Collegiate Finance Handbook and consult with your RFS/NCFC.

Financial Good Standing

Please see the Honor Board and Collegiate Finance Handbooks for details on financial good standing, Automatic Probation Notifications (APNs), Statement of Obligation Reviews (SORs) and implications for members who are not in good standing. If 11 days pass after a bill is due and it is still unpaid or a contract was issued and is unsigned, the vp: finance files an APN for the member. In addition to other probation terms, probation includes automatic forfeiture of the member's elected or appointed office.

Financial Delinquency Process

- Bills are due on the first of each month, though members are given until the tenth day as a grace period.
- Day 11: An Automatic Probation Notification (APN) needs to be assigned to the member in the Honor Board module of greekbill.
- After 30 days past due: the member should be assigned an SOR.
- Day 45: Email the 45 Day Financial Expulsion Review Letter.
- Day 60: The vp: finance sends a second SOR, which brings the member back to Honor Board for a financial expulsion discussion.

Expense Reimbursements

You may need to be reimbursed for an expense you incurred or the women you advise may have questions. Use the [finance disbursement form](#) to request expense reimbursements. Please complete the form, including receipts, and have the vice president responsible for the particular expense area approve the form by signing it. Then provide the complete materials to the vp: finance.

Contracts with Outside Vendors

CMT officers and directors may need to work with outside vendor contracts as they plan events. Some examples are found below:

| Role | Example of External Contracts |
|---------------------------|------------------------------------|
| vp: Foundation | university space for Anchor Splash |
| vp: programming | retreat space, buses |
| director of social events | venues, DJs, buses |
| president | composite pictures |

Fraternity Policy Regarding External Contracts

Only the chapter president and vp: finance are authorized to sign contracts on behalf of the chapter.

Contracts that are not signed by the president and vp: finance are considered to be contracts between the service provider and the **individual signing the contract** and the chapter may have no financial liability regarding the contract.

Signing contracts requires coordination among the president, vp: finance, ATC and officer involved in the contract. The ATC reviews all contracts before they are signed. Advisers can help the officer plan in advance to include adequate time for this coordination.

For more information, please see the Collegiate Finance Handbook section on Fraternity procedures for outside contracts.

Reimbursed Purchases made by the Chapter Members (360G Account)

Otherwise known as the 360G account, the chapter is always to be paid by the member before receiving items such as T-shirts, formal favors, etc. These items are charged/paid to the 360G account as not all members may use the item.

Officers/directors must think far in advance so the vp: finance may enter charges and have them invoiced and paid by members **before** the vendor invoice comes due. This account is monitored by the CFA and ATC and must be either at \$0.00 or have a positive balance at all times. A negative balance here means members are not paying their invoices in a timely manner and officers/directors have not observed the "far in advance" guideline.

Policies

Delta Gamma policy prohibits the purchase of alcoholic beverages with chapter funds. This policy includes financially co-sponsoring parties/events at which alcohol will be served.

Please reference the policy database in the DG website library for the latest and complete list of [Delta Gamma policies that relate to finance](#).

Can I pay a bill on behalf of the chapter?

Only the vp: finance, president and CFA are bonded to handle chapter monies. Bonding is a fee paid to third party to ensure the individual that is covered is handling funds in a responsible manner. If this does not happen, the chapter can recover whatever monies were not handled correctly. Should any other individual handle funds and there is a problem, the chapter has no recourse for recovery.

Finance and the House Corporation Board

See the [House Corporation Handbook](#) for information on what the chapter budget pays for vs. the house corporation budget.

When Officers/Advisers Transition

When you as an adviser transition out of your role:

- Please share an updated snapshot of expenses vs. budget with the new adviser.
- If the CFA or ATC is transitioning, ALL the outgoing and incoming advisers must go to the bank to remove the outgoing adviser and add the incoming adviser as signatures on the account. Any online bank user accounts should also be updated and shared with the chapter's collegiate finance consultant (CFC) at Executive Offices so she may continue to download the monthly bank statement(s).
- ATCs, please e-introduce the incoming CFA to the RFS/NCFC, CFC and other advisers.
- Ensure that the RFS/NCFC creates a new greekbill account for the incoming CFA and removes your account when you are done with adviser transition.
- Review the various reports and unpaid receivables in greekbill with the incoming CFA.

When your officer transitions to her replacement:

- Transitions should include a finance overview for each incoming officer and director. Transition information includes informing the incoming officer/director/chairperson about their budgets and assigning their new officer contracts. Officer contracts are uploaded to greekbill at the beginning of the officer term (typically the beginning of the calendar year) for all chapters. The vp: finance assigns and monitors the contracts for signatures. The officer contract is a year-long document whose language has been vetted by in-house counsel for Delta Gamma. The language contained is all-inclusive so only **one** document signed by multiple members is needed.
- The outgoing and incoming vp: finance and president must go to the bank to remove the outgoing officers and add the incoming officers as authorized signers on the account. Any online bank user accounts should also be updated and shared with the collegiate finance consultant (CFC) at EO.
- Note: The financial institution may request ALL signatories to be present at one time to affect these changes.
- Each officer must sign an officer budget contract.

CAMPUS PANHELLENIC

Each Delta Gamma collegiate chapter is an entity of Delta Gamma Fraternity. The chapter exists on a campus by virtue of an invitation from the college/university. The ideal relationship between the Fraternity and the host institution is a partnership in which both work cooperatively to provide the best possible fraternal, co-curricular experience for the college members.

Every campus is different! Some have volunteer Fraternity/Sorority Advisors (FSA), while others have a paid staff member in that position. On some campuses the fraternity/sorority community comprises numerous groups, while at some institutions there are just a few women's groups. In any situation, it is **Delta Gamma's expectation that all chapters will abide by Panhellenic guidelines.**

Fraternity/Sorority Advisor (FSA)

The FSA is an excellent resource and partner for all chapter advisers. An FSA who can rely upon and work well with their chapter advisers will be a helpful ally. Your active participation guiding and coaching the chapter typically means the FSA doesn't need to do the same. There are a few things you can do to build this relationship.

- **Communicate with the FSA regularly.** Once a term if the chapter is functioning well, more frequently if they are working through risk management, recruitment or other issues. Find out what expectations the FSA has for the chapter and the fraternity/sorority community. Are there regular reports the chapter needs to complete? Is there an awards or accreditation program? Become familiar with the processes and deadlines and inquire as to what role the FSA hopes you will play.
- **Share your goals and priority topics with the FSA.** Find out what resources are available on campus to support those goals. The FSA can often connect you with departments or other campus professionals who can facilitate training or educational programs on topics the chapter wants to learn about. Also, they often know which chapters are working on similar issues and can connect you with them so you can work together.
- **Foster an open dialogue.** You will not always agree with the FSA, and that is okay. Your priority is Delta Gamma. Their priority is the overall fraternity/sorority community. These two things may not always align. However, an open dialogue and regular communication will serve you well in the long run.
- **If you have any questions or concerns about working with your campus FSA, reach out to your region's Panhellenic Support Specialist (PSS).** The PSS is a DG volunteer focused on supporting our Delta Gamma chapters and their place in the Panhellenic community.

Quick Reference Guide for Confidential Information

Collegiate chapter bylaws and standing rules may NOT be shared. Model bylaws may be shared with the section regarding voting removed.

Recruitment voting methods/rules may NOT be shared. Information obtained or discussed during Evaluating Committee Meetings or Membership Selection regarding Potential New Members may NOT be shared.

Minutes of chapter meetings and Honor Board hearings (unless by court order) may NOT be shared. However, chapter sanctions can be shared with the university and/or law enforcement officers that are not member specific.

Chapter budgets may NOT be shared. Letters ascertaining an approved chapter budget or that chapter is in good standing financially may be sent.

Names of members involved in poor behavior may NOT be shared. (These women are urged to present themselves to the administration). Per legal advice, consult the Fraternity President or Executive Director if requested to submit names.

Membership demographic information may NOT be shared.

Formal ritual ceremonies may NOT be shared.

Any personal contact information of our members may NOT be shared.

The Fraternity Constitution may be shared as it is a public document on file at the Library of Congress.

Urge careful questioning when asked to sign anything on behalf of your chapter. Prior to signing a document (such as University standards, relationship or housing agreements) please submit to the Fraternity President for review and approval.

HELPFUL RESOURCES FOR ADVISORY BOARDS

Recruiting New Advisers

When recruiting new board members, it is important to readily have access to the documents that can help you answer their questions about time commitment, responsibilities, etc. The [Fraternity and Foundation Volunteer Position Description Handbook](#) includes a position description for all collegiate chapter advisers. Additionally, the [alumnae dual officer grid](#) details which volunteer roles can be held simultaneously. In extreme cases where there is no one else to serve in a volunteer role, you can work with your Regional Director (RD) to request a waiver from Council related to dual officer roles you may want to hold. While possible, we want to be sure this is a last resort, and you will need to demonstrate that you have exhausted all recruiting efforts prior to making that request.

How should you recruit new volunteers? Here are some ideas on where to start, but know that your regional team and the local alumnae group are great resources in the process.

- **Start local.** The nearest alumnae group is a tremendous asset when it comes to recruiting new board members. Beyond word of mouth, they also might be able to share the names of members who are extremely active within the group. Additionally, they can utilize established communication tools, like newsletters, where they can promote the opportunity to serve on the board.
- **Work with your regional team.** Your regional team may be able to gather a list of local alumnae, or alumnae from the chapter you support, who can serve on the board. Please be aware, this may mean some women serve in a virtual (also known as at-a-distance) capacity.
- **Utilize social media.** In the post, be clear about your ask. If you need a programming adviser or a new member education adviser, state it! Being clear about what you need might make potential volunteers more comfortable in coming forward. The collegiate chapter, local alumnae group and even the greater regional social media pages can be great places to share these posts. Be sure to work with the appropriate volunteers or collegiate officers who manage those platforms to make the posts.
- **Ask the other advisers for ideas.** All advisers play a role in advisory team recruitment! Please help the overall team by encouraging sisters with whom you are connected to consider serving as a Delta Gamma volunteer. Share the position descriptions with them and connect them with the advisory team chairman (ATC). Just as we ask collegians to encourage sisters to consider serving in officer roles, so too must our alumnae “tap a DG” who would be an excellent volunteer. Sometimes members aren’t serving because they haven’t been asked or told they’d be great at advising!

If you still have vacancies on your advisory team after utilizing these suggestions, you and your RD can collaboratively reach out to the assistant director for volunteer management, Lauren Utley, at Lauren@deltagamma.org for additional assistance in filling your advisory team.

Appointing New Advisers

While the Regional Director (RD) appoints the advisory team chairman (ATC), the ATC solely bears the responsibility to appoint the other advisers on the advisory team. While supervision is spread throughout the advisory team, the responsibility of appointment does not fall to any other position.

When a new adviser has been identified, they need to be added to the role in Anchorbase. This can be completed under the Roster header by selecting Tasks > Update Advisers and then following the prompts. It is important to note that members can be appointed in Anchorbase prior to their actual start date. For example, if in March, you identify a programming adviser who will start on July 1, you can enter her into Anchorbase as soon as she is ready to commit and select her start date as July 1.

Upon appointment in Anchorbase, advisers will receive a message with a link to a welcome video and this Advisory Team Handbook. Appointing women early will give them more time to review resources so they can feel confident and hit the ground running when they officially step into their role.

Onboarding New Advisers

While new advisers will receive some of the information they need to be successful in their roles automatically upon appointment in Anchorbase, there are some key steps that ATCs and volunteer supervisors should take when a new volunteer joins the team.

- **Send an introductory email to all of the key relationships.** ATCs should send an email formally connecting the new adviser with the collegiate officers she advises. It is also essential to introduce her to the other members of the advisory team, and even to connect her with the regional specialist with whom she will work most directly.
- **Ensure a meeting with the volunteer supervisor occurs.** It is important to map out expectations for the role from the very beginning. This meeting is a great time to go over the position description, valuable resources from the Advisory Team Handbook, and ensure that she has access to Anchorbase and the other platforms she needs to be successful in her advising role. It is also an appropriate time to map out communication preferences for one another.

Advisory Team Meetings

The advisory team should be meeting on a regular basis, at least twice per year. These meetings can take place in person or can utilize technology to happen virtually. To assist in the efficiency of advisory board meetings, the following template, which uses standard *Robert's Rules of Order* procedure, may be helpful. Minutes should be taken at each meeting for record keeping purposes, and as a reference for those advisers who are unable to be in attendance.

- I. Call to Order
- II. Minutes approved/corrected

III. Advisory team chairman update

The ATC should give any updates from the Fraternity or the regional team.

IV. Adviser reports

Each adviser should give a brief report regarding the officers they advise (i.e., upcoming events, project progress, concerns).

V. Discussion of issues

If there are any general chapter issues, they should be discussed at this time (i.e., communication with officers, chapter morale). Only topics should be listed in the minutes, not the actual details of the discussion.

VI. Adjournment

Using Anchorbase

Anchorbase is the official Delta Gamma officer reporting system. Collegiate officers use Anchorbase to learn of deadlines and submit forms to be reviewed by advisers and the regional team. More information about Anchorbase tasks can be found in officer specific handbooks and through the Anchorbase webinars which are outlined in the [Adviser Position-Specific Resources section](#) of this handbook.

To access Anchorbase, you can visit www.deltagamma.org and find the Anchorbase link at the bottom of the page. Your log in credentials are the same as what you use to log into the www.deltagamma.org website. You can also navigate directly to <https://anchorbase.deltagamma.org/>.

After reviewing the webinar related to the collegiate office you advise, begin your exploration of Anchorbase by viewing the dashboard. This will be the first screen that appears upon logging in with your credentials. You will be able to see, at quick glance, what collegiate officer tasks are upcoming and can explore the menu at the top of the screen to see what tasks and reports are available within Anchorbase. Some key reports that might be beneficial live within the Roster header under 'Reports,' including the collegiate chapter member, chapter officer and advisory team rosters.

Delta Gamma Terminology & Acronyms

In order to ensure that all Delta Gamma publications and websites represent the ideals and standards of the Fraternity, such entities associated with Delta Gamma or depicting its name, symbols, badge or slogans must adhere to certain standards.

The name "Delta Gamma," the Greek letters "DG," the crest, "Anchor Splash®," "The ANCHORA of Delta Gamma," "Anchor Market Place," "Anchor Girl," "DeeGee," "Here

for Good,” “#IAmASororityWoman,” “Do Good” and the badge of the Fraternity are all registered trademarks of Delta Gamma Fraternity.

The [Delta Gamma Style Guide](#) details terms that are commonly used throughout Delta Gamma collegiate and alumnae websites and publications. Use it (in conjunction with the Delta Gamma [Branding Guidelines](#)) as a guide when designing web pages or preparing documents. Anything that is not covered in the [Delta Gamma Style Guide](#) will be handled according to [AP style](#).

advisory team chairman (ATC): The main chapter adviser for every collegiate chapter.

alumna: A woman who is no longer a collegian.

alumnae (*a-lum-knee*): A group of women who are no longer collegians.

Anchorbase: This is the digital member database and officer/volunteer portal, which took the place of e-Ops+ in 2019.

Anchor Games: This is the umbrella term that refers to the various “anchor” philanthropic fundraisers Delta Gamma chapters host including Anchor Splash®, Anchor Bowl, Anchor Slam, etc.

Article II: Article II is found in our Fraternity Constitution and states the Objects or purpose of the Fraternity. It is as follows: *The objects of this Fraternity shall be to foster high ideals of friendship among women, to promote their educational and cultural interests, to create in them a true sense of social responsibility and to develop in them the best qualities of character.*

Automatic Probation Notification (APN): Chapter officers, such as the vp: finance, vp: communications and director of scholarship, use an APN to notify a member that they are not in good standing because they have failed to meet financial, housing, attendance or scholastic obligations. The vp: social standards receives a copy of all APNs and monitors the process with the help of Honor Board. In some situations, APNs could be issued for other “automatic” infractions of the chapter’s bylaws and standing rules. Behavioral issues are addressed through Honor Board’s “Standard Procedure” and not by issuing an APN.

badge: Worn as our outward symbol of our membership in Delta Gamma. Badge is the preferred name for the Delta Gamma golden anchor “pin.” A badge should be purchased at the time of Initiation by new members.

big sister/little sister: This is the preferred terminology over “pledge daughter,” “pledge mom,” “pledge mommy,” “baby,” “baby anchor,” etc.

bylaws and standing rules (BLSRs): In addition to the Fraternity’s Constitution and Delta Gamma policies and procedures, the BLSRs are the “law” of the chapter.

chapter financial adviser (CFA): Adviser who focuses on the area of finance and housing for collegiate chapters.

chapter management team (CMT): CMT is Delta Gamma's executive board which is made up of the following officers: president, vp: social standards, vp: finance, vp: communications, vp: programming, vp: member education, vp: membership, vp: Panhellenic and vp: Foundation. All collegiate chapters must have these officers.

collegiate members or collegians: This is the preferred terminology over "actives."

Collegiate Development Consultant (CDC): CDCs are Delta Gamma's version of the field consultant. Each collegiate chapter receives at least one visit from a CDC each year.

collegiate development specialist (CDS): CDSs are Delta Gamma staff members who work directly with our collegiate chapters in the areas of operations, risk management and programming.

collegiate finance consultant (CFC): CFCs are Delta Gamma staff members who work directly with our collegiate chapters in the area of finance.

collumnae: This refers to combined collegiate and alumnae activities.

Continuous Open Bidding (COB): The preferred term for "informal recruitment." Delta Gamma policy requires all collegiate chapters to use the COB procedure to gain additional members until the chapter reaches Total and Quota, which are set by the College Panhellenic.

Council: This is Delta Gamma Fraternity's international board.

Council Appointed Coordinator (CAC): This is a Delta Gamma volunteer who oversees a specific collegiate chapter in terms of operations (e.g., Honor Board, elections, bylaws and standing rules, programming, etc.).

Collegiate Recruitment Consultant (CRC): This is a Delta Gamma volunteer who oversees a specific collegiate chapter in terms of recruitment.

Delinquent Report Spreadsheet (DRS): An Excel spreadsheet that details collegiate chapters' financial standing, and is uploaded to the DG website library by the close of business every Thursday.

DG Dialogues: This is Delta Gamma's member education program that focuses on our values. Chapters can select which programs they would like to participate in but must complete a program from each of the four pillars every calendar year: social responsibility, character, friendship and educational and cultural interests.

establishment/re-establishment: This is the term used when creating a new chapter or re-opening a previously closed collegiate chapter. This is the preferred terminology over “colony/colonization.”

events/events with alcohol: This is the preferred term over “social,” “mixer,” etc.

Event Guideline (EG): An event guideline is required for: (1) any Delta Gamma sponsored or co-sponsored event where alcohol will be served; (2) any Delta Gamma sponsored event held at an off-campus location; (3) each activity of Anchor Games (Anchor Splash®, Anchor Slam, Flight for Sight, etc.); and (4) all events for which the ATC determines an event guideline is necessary for risk management purposes.

Executive Offices (EO): This is the term that refers to Delta Gamma’s headquarters. This is the preferred terminology over “nationals.”

greekbill: This is Delta Gamma’s finance system for collegiate chapters.

GreekLifeEdu: This is an e-learning tool that addresses hazing, alcohol and sexual assault. All new members are required to complete this course prior to Initiation.

Foundation Cabinet: Refers only to the appointed volunteer positions that have a vote with the Foundation: Foundation and Fraternity Directors, Regional Directors (RD) and Regional Foundation Coordinators (RFNC). These volunteers are also included in the term Leadership (see below).

Fraternity Cabinet: Refers only to the appointed volunteer positions that have a vote with the Fraternity at Convention: Fraternity Directors, Regional Directors (RD), Nominating Committee Chairman, Panhellenic Operations Chairman, Regional Alumnae Specialists (RAS), Regional Collegiate Specialists (RCS), Regional Collegiate Recruitment Specialists (RCRS), Regional Finance Specialists (RFS), Regional Housing Specialists (RHS), and the Constitution and Elections Chairman. These volunteers are also included in the term Leadership (see below).

fraternity/sorority community: This is the preferred term, instead of Greek community or Greek system.

Hannah’s Closet: This is the official boutique for Delta Gamma clothing and goods. Chapters can search greeklicensing.com for all other licensed vendors.

Honor Board: This is Delta Gamma’s standards board. Every collegiate chapter must have an Honor Board which is made up of the chapter president, vp: social standards, a sophomore member, a junior member and a member-at-large.

joint chapter management team (JCMT): JCMT is made up of the CMT officers and the directors that report to each vice president. The number of directors varies by chapter size.

Leadership: This is an all-encompassing term that refers to volunteers beyond the local level. Leadership includes these volunteer positions: Council, Board of Trustees, Fraternity Housing Corporation (FHC) and Fraternity Management Corporation (FMC) Boards, Cabinet, Parliamentarian, Government Relations Liaison, Council Appointed Coordinators (CAC), Council Appointed Project Liaison, Collegiate Recruitment Consultants (CRC), Alumnae Development Consultants (ADC), New Chapter Coordinators (NCC), New Chapter Recruitment Coordinators (NCRC), New Chapter Finance Coordinators (NCFC), Nominating Committee, Panhellenic Support Specialists (PSS), Foundation Parliamentarian, Foundation Constitutions Chairman, and Foundation Governance Committee.

library: The Barbara Nussa Boersma Library is the members-only section of Delta Gamma's website, which contains policies, procedures, handbooks and forms for officers and members. Some content requires a login to access.

member class: This is the preferred term over "pledge class."

New Chapter Coordinator (NCC): This is a Delta Gamma volunteer who oversees a new collegiate chapter in terms of operations (e.g., Honor Board, elections, bylaws and standing rules, programming, etc.).

New Chapter Recruitment Coordinator (NCRC): This is a Delta Gamma volunteer who oversees a new collegiate chapter in terms of recruitment.

new member: The National Panhellenic Conference (NPC) term that replaced the term "pledge" when referring to people who have just joined.

New Member Pursuit (NMP): The NMP is the chapter's new member education program, including the Fraternity education modules and new member rituals.

National Panhellenic Conference (NPC): Founded in 1902, NPC is an umbrella organization for 26 inter/national women's fraternities and sororities—including Delta Gamma.

Oath of Friendship: This is an Oath that is taken by new members during Initiation. It is then recited after chapter meeting and in other settings. It is an Oath that can only be said with and in front of initiated members.

Panhellenic Support Specialist (PSS): This is a Delta Gamma volunteer who oversees collegiate chapters in their region in terms of Panhellenic.

potential new member (PNM): This is the preferred term over "rushee," "pledge" or "baby."

Patricia Peterson Danielson (PPD) Award: The PPD Award is an award given to every collegiate chapter who meets Fraternity standards. A collegiate chapter must receive the PPD Award each year of the biennium in order to be eligible for the Outstanding Collegiate Chapter Award at Convention.

primary recruitment: This is the preferred terminology over “formal recruitment.”

recruitment: This is the terminology preferred over “rush.”

Regional Collegiate Specialist (RCS): This is a Delta Gamma volunteer who oversees a group of collegiate chapters in terms of operations (e.g., Honor Board, elections, bylaws and standing rules, programming, etc.)

Regional Finance Specialist (RFS): This is a Delta Gamma volunteer who oversees collegiate chapters and alumnae groups in their region in terms of finance.

Regional Housing Specialist (RHS): This is a Delta Gamma volunteer who oversees house corporation boards in their region.

Regional Collegiate Recruitment Specialist (RCRS): This is a Delta Gamma volunteer who oversees collegiate chapters in their region in terms of recruitment.

Regional Director: This is a Delta Gamma volunteer who manages a regional team made up of eight (8) volunteers including, but not limited to, the RCS, RFS, RHS and RCRS.

resign: This is the term Delta Gamma utilizes when a member severs their membership. We do not use the term deactivate.

Recruitment Preparation Workshop (RPW): Chapters hold several RPWs each year. One RPW takes place just before recruitment and is also known as “prep week.”

Service for Sight: This is Delta Gamma’s philanthropic mission.

Statement of Obligation: This is the agreement each new member must sign before Initiation, agreeing to follow all Delta Gamma policies and procedures.

Statement of Obligation Review (SOR): This document is completed when a member violates the terms of the Statement of Obligation. This form is submitted to Honor Board who then holds an allegation assessment and hearing based on the SOR.

woman/women: The preferred terminology over “girls” when referring to Delta Gammas.

GENERAL ADVISER RESOURCES

Resources

[CMT Planning Tool](#)

[Collegiate Chapter Officer Manual \(CCOM\)](#)

[Delta Gamma Fraternity Standards for Collegiate Chapters](#)

[Honor Board Handbook](#)

Robert's Rules of Order

[Think Anchor Deep Handbook](#)

[2020-2021 Collegiate Chapter Resource Guide \(Changes Due to COVID-19\)](#)

Webinars

[Available Recorded Webinars by Topic](#)

[Using Anchorbase: Chapter Advisers](#) (Password: 1873)

ADVISER POSITION-SPECIFIC RESOURCES

(Use CTRL+F to quickly locate your specific advisory team position)

advisory team chairman (ATC)

Resources

- [Behavior Threat Assessment Rubric](#)
- [CMT Quick Guide: president](#)
- [Changing of the Tides: Slating, Elections and Transitions \(SET\)](#)
- [DG Dialogues Program Guide](#)
- [Event Guidelines: Social Event Planning Guide](#)
- [Event Guidelines: Summary and Intended Purposes of the Event Guideline Waivers](#)
- [House Corporation Handbook](#)
- [Member Status Guide for Chapter Members](#)
- [National Panhellenic Conference \(NPC\) Manual of Information \(MOI\)](#)
- [Recruitment Confidential](#)
- [Room Search Guidelines](#)
- [Scholarship Handbook: DG Smart Guide](#)
- [Supporting Survivors Resource Guide](#)

Forms

- [Campus Resource Worksheet for Collegiate Chapters](#)
- [Early Alumna Status \(EAS\) Request Packet](#)
- [Resignation of Membership](#)
- [Resignation of New Membership](#)

Webinars

- [Mental Health and Sexual Violence Response](#)
- [Medical Amnesty Policy](#) (Password: 1873)
- [Using Anchorbase: Chapter President](#) (Password: 1873)
- [Using Anchorbase: ATC](#) (Password: 1873)

Honor Board adviser (HBA)

Resources

- [Behavior Threat Assessment Rubric](#)
- [CMT Quick Guide: vp: Social Standards](#)
- [JCMT Quick Guide: Honor Board member](#)

[Inclusion & Accountability: Addressing Racism in Honor Board](#)

[Member Status Guide for Chapter Members](#)

[Room Search Guidelines](#)

[Supporting Survivors Resource Guide](#)

Forms

[Honor Board: Adviser Activity Log](#)

[RCS Honor Board Letters](#)

Submitted to RCS/NCC/CAC:

- Honor Board:
 - [Compliance Packet Checklist](#)
 - [Formal Hearing Minutes](#)
 - [Meeting Minutes](#)
 - [Notice of Rights](#)
 - [Weekly Activity Log](#)
- Honor Board Letters:
 - [Automatic Probation Notification \(APN\)](#)
 - [Formal Hearing](#)
 - [Notification of Recommendation Absent Member](#)
- [Early Alumna Status \(EAS\) Request Packet](#)
- [Summary Activity Log](#)

Submitted to EO when completed:

- [Resignation of Membership](#)
- [Resignation of New Membership](#)

Webinars

[Using Anchorbase: vp: social standards](#) (Password: 1873)

[Webinar: Mental Health and Sexual Assault: Supporting Sisters through Honor Board](#)

social events adviser

Resources

[Event Guidelines: Social Event Planning Guide](#)

[Event Guidelines: Summary and Intended Purposes of the Event Guideline Waivers](#)

[JCMT Quick Guide: director of social events](#)

Webinars

[Using Anchorbase: director of social events](#) (Password: 1873)

special events adviser

Resources

[Event Guidelines: Social Event Planning Guide](#)

[Event Guidelines: Summary and Intended Purposes of the Event Guideline Waivers](#)

[JCMT Quick Guide: director of special events](#)

Webinars

[Using Anchorbase: director of special events](#) (Password: 1873)

chapter financial adviser (CFA)

Resources

Budget Preparation FAQs (emailed to chapters during budget season)

[Collegiate Finance Handbook](#)

[CMT Quick Guide: vp: finance](#)

[House Corporation Handbook](#)

Forms

Budget Presentation Template (emailed to chapters during budget season)

Budget Vote Email Template (emailed to chapters during budget season)

[Disbursement Request](#)

Budget Template (emailed to chapters during budget season)

[45 Day Collections Notice Letter](#)

Webinars

[Using Anchorbase: vp: finance](#) (Password: 1873)

[Submitting Fundraising forms through Anchorbase](#) (Password: 1873)

house management/chapter property adviser

Resources

[JCMT Quick Guide: director of chapter property](#)

[House Corporation Handbook](#)

[Roommate Conversations Guide](#)

[Room Search Guidelines](#)

Webinars

[Using Anchorbase: house corporations](#) (Password: 1873)

funds adviser

Resources

[Collegiate Finance Handbook](#)

[JCMT Quick Guide: director of funds](#)

Webinars

[Using Anchorbase: vp: finance](#) (Password: 1873)

membership adviser

Resources

[CMT Quick Guide: vp: membership](#)

[Foundation Education for Recruitment: Let's Talk Philanthropy](#)

[Hearts Behind the Anchor: Recruitment Prep Week Guide](#)

[MyVote Resources Folder](#), which includes:

- MyVote Admin Guide
- MyVote Chapter Presentation
- MyVote EVC FAQ
- MyVote Matching FAQ
- MyVote Presentation – Facilitators Guide

[National Panhellenic Conference Manual of Information](#)

[Recruitment Confidential](#)

[Recruitment Confidential: Conversation Manual](#)

[Video Best Practices](#)

Forms

[Chapter Communications & PR Plan](#)

[Online Recommendation Form](#)

Webinars

[EVC 101](#) (Password: 1873)

[Membership Selection](#) (Password: 1873)

[MyVote](#) (Password: 1873)

[MyVote for Campus Director](#)

[MyVote for ICS](#)

[Preference and Sealing the Deal](#) (Password: 1873)

[Recommendation Forms](#) (Password: 1873)

[Using Anchorbase: vp: membership and directors](#) (Password: 1873)

recruitment records adviser

Resources

[JCMT Quick Guide: director of recruitment records](#)

Webinars

[Using Anchorbase: vp: membership and directors](#) (Password: 1873)

continuous recruitment adviser

Resources

[JCMT Quick Guide: director of continuous recruitment and retention](#)

Webinars

[Using Anchorbase: vp: membership and directors](#) (Password: 1873)

member education adviser

Resources

[CMT Quick Guide: vp: member education](#)

[Event Guidelines: Summary and Intended Purposes of the Event Guideline Waivers](#)

[Social Event Planning Guide For events without alcohol involving vp: member education](#)

Forms

[Campus Resource Sheet](#)

Webinars

[Using Anchorbase: vp: member education and directors](#) (Password: 1873)

new member education adviser

Resources

[JCMT Quick Guide: director of new members](#)

[New Member Pursuit Facilitator's Guide](#)

[New Member Notebook](#)

Webinars

[Using Anchorbase: vp: member education and directors](#) (Password: 1873)

rituals adviser

Resources

[JCMT Quick Guide: director of rituals](#)

[Rituals Handbook](#)

[Rituals Supply List](#)

Forms

[Ritual Order Form](#)

[Ritual Standards Order Form](#)

Webinars

[Using Anchorbase: vp: member education and directors](#) (Password: 1873)

scholarship adviser

Resources

[JCMT Quick Guide: director of scholarship](#)

[Scholarship Handbook: DG Smart Guide](#)

Webinars

[Using Anchorbase: vp: member education and directors](#) (Password: 1873)

communications adviser

Resources

[Branding Guidelines](#)

[Chapter Composite Guidelines](#)

[CMT Quick Guide: vp: communications](#)

[Communications Handbook](#)

[DG Style Guide](#)

[Guidelines for Taking Effective Minutes](#)

MemberPlanet E-Newsletter Templates:

- [Step-by-Step Instructions](#)

[Social Media Policy](#)

Forms

[Chapter Communications and PR Plan](#)

[Chapter Meeting Excuse](#)

[Model Bylaws and Standing Rules](#)

[Sample Communications Plan](#)

Webinars

[Using Anchorbase: vp: communication](#) (Password: 1873)

public relations adviser

Resources

[Communications Handbook](#)

[DG Style Guide](#)

[JCMT Quick Guide: director of public relations](#)

[Social Media Policy](#)

Forms

[Chapter Communications and PR Plan](#)

chapter archives adviser

Resources

[Chapter Anniversary Planning Handbook](#)

[JCMT Quick Guide: director of chapter archives](#)

Panhellenic adviser

Resources

[Anchored in Panhellenic Resource Guide](#)

[CMT Quick Guide: vp: Panhellenic](#)

[Communications Handbook](#)

[National Panhellenic Conference Manual of Information](#)

Webinars

[Using Anchorbase: vp: Panhellenic](#) (Password: 1873)

Foundation adviser

Resources

[Foundation Education for Recruitment: Let's Talk Philanthropy](#)

[CMT Quick Guide: vp: Foundation](#)

[JCMT Quick Guide: director of service](#)

[Delta Gamma Foundation Policies](#)

[Do Good Service](#)

[Foundation Focus](#)

[Greekbill Codes for Fundraising](#)

[Sisters Helping Sisters: Need-Based Scholarship Application Guide](#)

[Merit-Based Scholarship Application Guide](#)

Webinars

[memberplanet: How to Create a Donation Page](#)

[memberplanet: What's the Different Between a Payment Form and Event Page?](#)

[memberplanet: creating a payment form](#)

- Great for individual and team sign ups, t-shirt sales, etc.

[memberplanet: creating an event](#)

- Great for signature events like Slices for Sight, DG Desserts, etc.

[Download the Mobile App to Collect On-Site Payments](#)

fundraising adviser

Resources

[Delta Gamma Foundation Policies](#)

[Foundation Focus](#)

[JCMT Quick Guide: director of Anchor Splash](#)

[JCMT Quick Guide: director of fundraising](#)

[Greekbill Codes for Fundraising](#)

Webinars

[Download the Mobile App to Collect On-Site Payments](#)

[memberplanet: how to implement and use memberplanet for fundraising](#)
(Password: *kmAV@8M)

[memberplanet: What's the Different Between a Payment Form and Event Page?](#)

[memberplanet: creating a payment form](#)

- Great for individual and team sign ups, t-shirt sales, etc.

[memberplanet: creating an event](#)

- Great for signature events like Slices for Sight, DG Desserts, etc.

programming adviser

Resources

[Adviser Recognition Ideas](#)

[Article II Chapter Goal Setting](#)

Calendar Planning Guide (available in the library during calendar planning season)

[Calendar Requirements by Values](#)

[Changing of the Tides: Slating, Elections and Transition](#)

[CMT Quick Gude: vp: programming](#)

[Collumnae Event Planning Guidelines](#)

[DG Dialogues Program Guide](#)

[GreekLifeEdu Instructions](#)

[JCMT Quick Guide: director of senior programming](#)

[JCMT Quick Guide: director of alumnae relations](#)

[JCMT Quick Guide: director of DG Dialogues](#)

[Senior Programming Recognition](#)

Webinars

[How to Facilitate Small Groups](#)

[Using Anchorbase: vp: programming](#) (Password: 1873)

APPENDICIES

APPENDIX A. Chapter Financial Adviser (CFA) Information

Each entity, meaning the Fraternity, the Foundation and house corporation, maintains its own finances. The vp: finance and chapter fall under the Fraternity. The chapter may choose to donate to the Foundation. The chapter is the mainstay of house corporation funds.

The duties of the vp: finance include managing the business of the chapter, the budgeting process, contracts, monthly financial reports and processing reimbursements and receivables.

While summaries of each of the aforementioned topics and other resources are included here, they should be used in conjunction with the [Collegiate Finance Handbook](#) as it provides the detailed information you will need to successfully serve in your role as CFA.

greekbill

greekbill, www.greekbill.com, is our Fraternity-approved accounting system. The online system bills members and supports online payment by credit card, debit card or e-check. If a member gives permission, parents may access her account and make payments through a parent account. Members in the states of Arkansas, Delaware, Mississippi and Nebraska, where the age of majority is greater than 18, are **required** to have parent accounts as are any new members under the age of 18 in the other 46 states. greekbill provides real-time information on member payments, contract signature status and reports on overall financial health of the chapter. To support accurate billing, the vp: finance must keep the roster in greekbill up-to-date throughout the year. Members should be removed when they graduate or resign their membership, provided they do not owe the chapter monies.

By day 10 of each month, the vp: finance enters all checks and deposits on greekbill and submits the report. Said report is forwarded to the chapter's collegiate finance consultant (CFC) at EO. The CFC reconciles the monthly reports and contacts the vp: finance if any follow-up action is needed. This information will also be itemized on the Delinquent Report Spreadsheet (DRS). Online OR paper banks statements must be made available to the CFC so that they may reconcile. Chapters may specify that the bank should send any paper statements to their CFC at EO however, electronic access is preferred. Chapters are to share their online banking ID, passwords and security questions with their ATC, CFA and CFC to provide access to the bank statements that are needed to reconcile the finance report.

greekbill Chapter Representative

greekbill assigns its own staff to the Delta Gamma accounts who are available to assist with greekbill questions. Your greekbill representative will provide you with your initial greekbill username and password. Please see the greekbill [Quick Reference Guide](#) for more information on getting started with the tool. Also, you

and/or your group of local finance team members can request an online training session from greekbill. Specific greekbill staff are assigned to our Delta Gamma chapters and are available to assist you and your team via email and phone.

Monthly Financial Report

The vp: finance creates monthly financial reports in greekbill and then submits them to the collegiate finance consultant (CFC) at Executive Offices (EO) by day 10 of each month. This includes the summer months.

Finance Throughout the Year

Below is a summary of finance activities that are required to be performed each month and tips that the advisers can do to support the activities.

Every Month

- vp: finance completes monthly finance report on day 10 of the month. Review the cover sheet and receivables report. Advise the vp: finance about handling receivables/delinquent accounts/Honor Board/collection issues.
- On day 11 of every month, ensure that the vp: finance submits a copy of the greekbill receivables list to Honor Board and files the APNs for past dues. The chapter is to use Honor Board for financial purposes by sending any member who is past due to Honor Board. This practice will help ensure Honor Board remains aware of the financial status of chapter members and hold members accountable. See the Collegiate Finance Handbook and Honor Board Handbook for more details.
- Ensure that the vp: finance is balancing the checkbook monthly. Depending on her experience, she may need your assistance getting started with this important task. Share your insights on the importance of keeping business accounts current.
- Review the receivables report with your vp: finance. Support her in filing SORs and make sure Honor Board keeps the vp: finance informed of the results of the meeting. Monitor for collection notice letters and collection submissions.
- Support your vp: finance in adhering to DG policies and the Collegiate Finance Handbook. For example, she should never accept cash payments from members.
- Monitor the credentials report. As we get closer to Convention in even-numbered years, the credentials committee provides updates on the credentials report.
- Share updates about the chapter's financial health with your advisory team.

| Monthly Responsibilities | |
|--|---|
| <i>July 1 – Beginning of fiscal year</i> | |
| July | <ul style="list-style-type: none"> • vp: finance creates Dues and Fees Contracts on greekbill for the coming year and assigns for member signature |
| August* | <ul style="list-style-type: none"> • vp: finance assigns Room Agreements for the FOLLOWING (not current) fiscal year • vp: finance monitors contracts for member signatures |
| September* | |
| October | |
| November | |
| December | <ul style="list-style-type: none"> • As part of transitions, vp: finance assigns new officer contracts |
| January* | |
| February | <ul style="list-style-type: none"> • vp: finance starts chapter budget process (Canadian chapters)/secures RFS/NCFC approval |
| March | <ul style="list-style-type: none"> • HC Annual Agreement signed • vp: finance starts chapter budget process (US chapters)/secures RFS/NCFC approval |
| April | <ul style="list-style-type: none"> • Chapter votes on (1) upcoming fiscal year budget and (2) spending annual and cumulative surpluses. CFA should be present for these votes. Budget presentation is a two-week cycle: <ul style="list-style-type: none"> ○ Week 1 – presentation ○ Week 2 – voting <ul style="list-style-type: none"> ▪ CFAs should help the vp: finance brainstorm ideas on how to share the budget details with the chapter so that they understand where their money goes. • CFA discuss with vp: finance plans for checkbook and finance |
| May | |
| June | <ul style="list-style-type: none"> • June 30 – end of fiscal year; 332/Anchor Games account must end year with a \$0.00 balance. • 360G/Reimbursable account must end year with \$0.00 balance • For resources on end of the fiscal year “to dos,” see the Collegiate Finance Handbook and emails that your RFS/NCFC and/or the Director: Finance sends. |

* After recruitment, vp: finance assign new member contracts

Additional People Involved in Collegiate Finance

As the CFA, you are not solely responsible for the collegiate chapter finances. There are many people, including collegiate officers, other volunteers and paid staff members who have responsibilities for this area. The chart below briefly outlines to whom you can turn for assistance in particular areas. If a situation arises and you are unsure where to turn, your Regional Finance Specialist (RFS) or New Chapter Finance Coordinator (NCFC) is a great first person to reach out to for assistance.

| Monthly Responsibilities | | |
|--------------------------------------|--|---|
| | Role | Can Provide Assistance With |
| local collegiate finance team | vp: finance | |
| | director of house management/chapter property | |
| | finance committee | |
| | director of funds | |
| | chapter president/CMT | |
| | advisory team chairman (ATC) | collections, roster maintenance |
| | Honor Board adviser (HBA) | Honor Board issues |
| | chapter financial adviser (CFA) | budgets, basic chapter finance questions |
| house corporation board | | |
| regional team members | Regional Collegiate Specialist (RCS) / Council Appointed Coordinator (CAC) / New Chapter Coordinator (NCC) | Honor Board issues |
| | Regional Finance Specialist (RFS) / New Chapter Finance Coordinator (NCFC) | budgets, monthly reports, greekbill, charges, member status changes, training, past due receivables |
| | Regional Housing Specialist (RHS) | Annual Agreement |
| EO staff* | collegiate finance consultant (CFC) | monthly reports, collections, bad debt write off |
| | Office of Housing (OOH) staff | housing invoices |
| | collegiate development specialist (CDS) | roster updates |

**EO staff are the only paid staff members working with collegiate finance. All other individuals listed on this chart are either collegiate officers or volunteers.*

Reimbursements, Receivables and Collections

Member debt (receivables) is secured by having members sign the contracts that define their financial obligation to the chapter: the Statement of Obligation, Dues and Fees Contract, Room Agreement and chapter bylaws and standing rules

(BLSRs). Delta Gamma chapters are required to have less than 1 percent of yearly income in unsecured receivables to stay in good standing with the Fraternity. Chapters over that limit are at risk of being placed on report status to Director: Finance.

Members stay in good standing with their chapter by signing their contracts and paying their bills according to the individual payment schedule they choose when signing the Dues and Fees Contract. **When a member has outstanding debt, the vp: finance must work with Honor Board per the process outlined in the [Collegiate Finance Handbook](#).** Please refer to the “Financial Delinquency Process” within the handbook for more information and contact the chapter's RFS/NCFC or CFC.

Purchase Cards

Purchase cards are assigned as part of certain officer roles within the chapter. A purchase card allows a chapter member to make a chapter-related purchase without having to front their own money at time of purchase. Purchase cards are only to be used for chapter expenses and any other use (such as personal items or alcohol) is fraudulent. Purchase cards are set up through greekbill and cost \$5 per card. Purchase card holders must promptly turn in all their receipts to the vp: finance and indicate to which budget account all expenses should be allocated.

Convention Credentials

Chapters must be in good standing to vote at Convention. The Fraternity Treasurer oversees the Credentials Committee. In the months prior to Convention, she will communicate the Convention credential committee criteria, and provide that information to the regional teams. See the [Credentials Committee Policy](#) in the DG website library. During Convention years, it is updated weekly beginning in May. The regional team also supports each of its chapters in ensuring that the criteria are met. The ATCs and CFAs will also want to know the criteria and support the chapter in achieving each of the items. The chapter's RFS/NCFC and the Fraternity Director: Finance will be in communication on an ongoing basis to ensure the chapter meets these requirements.