

**CHAPTER MANAGEMENT TEAM (CMT) PLANNING TOOL**

To be reviewed at the beginning of each month

This tool can be used as a resource for planning and organizing CMT’s efforts throughout the year. While this list is intended to be a comprehensive list of requirements and optional items, it does not replace the need for thoughtful, creative programming that ensures a Culture of Care within your chapter. Members of CMT should work as a team, collaborate with all directors, and delegate components of these responsibilities to committees. Working together, through thoughtful delegation and effective communication, will aid chapter leadership to make the best use of their time and help chapter activities and operations run smoothly.

# August-September

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *Chapter Management Team (CMT) Planning Tool* with CMT.

[ ]  Ensure all officers and advisers have the *Collegiate Chapter Officers Manual (CCOM)*, and the appropriate and current handbooks.

[ ]  Assign committee membership based upon new members’ and members’ committee applications.

[ ]  Review and adjust Bylaws and Standing Rules (BLSRs) to the current Fraternity model and, after Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) approval, post on Anchorbase and greekbill after voted on by the chapter (if not completed in the spring term).

[ ]  Update all Anchorbase Fact Sheets and roster for your chapter ensuring correct address, phone number, e-mail address and graduation year data for all members.

[ ]  Educate all members/new members about Delta Gamma policies and procedures regarding alcohol and crisis management, as described in the *CCOM,* at first chapter meeting of term in cooperation with vice president: social standards.

[ ]  Review the *Recommended Practices for Managing Individual Emotional/Mental Health Concerns*.

[ ]  Review the most recent CDC Visit Report from the previous term, if applicable, and identify areas for improvement CMT can focus on this term.

[ ]  Provide education to chapter about chapter officer responsibilities, slating and election procedures.

[ ]  Ensure all Initiation Authorization tasks are completed, if applicable, in order to receive authorization from Executive Offices.

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director (RD).

[ ]  Attend all house corporation meetings with the vice president: finance and the director of house management.

## vice president: social standards

[ ]  Review the previous term *End-of-Term Summary Sanction Activity* and identify areas for improvement on which Honor Board can focus this term.

[ ]  Review the CDC Visit Report from the previous term, if applicable, and identify areas for improvement on which Honor Board can focus this term.

[ ]  Review the *Recommended Practices for Managing Individual Emotional/Mental Health Concerns* with Honor Board.

[ ]  Plan a goal-setting session at the first Honor Board meeting of the term.

[ ]  Plan for a CDC visit, if applicable.

[ ]  Submit the *Honor Board Weekly Meeting Minutes* and *Weekly Activity* to Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) on a weekly basis.

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas for Honor Board and CMT to address trends. Complete any necessary allegation assessments, and review probation status as needed.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

[ ]  If applicable, reach out to the Alcohol Skills Training Program (ASTP) facilitator to coordinate her visit (once every 3 years). This should be done at least a month before her arrival.

[ ]  Begin preparation for application for *the Patricia Peterson Danielson Award (PPD) Application* due to RCS/CAC/NCC by December 1 (highly recommended).

[ ]  Compile/complete the *Honorable Chapter Award Application* due November 1 to submit to the ATC and RCS/CAC/NCC.

[ ]  Complete upcoming awards applications, if applicable.

## vice president: finance

**This Month (Our Fiscal Year begins on July 1!):**

[ ]  Ensure greekbill has sent first invoices to all members based on the chapter payment schedule.

[ ]  Monitor greekbill to ensure all chapter members have signed their Dues & Fees Contracts on greekbill.

[ ]  Monitor greekbill to ensure all chapter members have signed the chapter’s Bylaws and Standing Rules (BLSR) on greekbill.

[ ]  Compare greekbill roster to Anchorbase roster and work with vice president: social standards and vice president: communications to make sure both rosters are exactly the same.

[ ]  ***New Members:*** New member information will be synced to greekbill from Anchorbase. Once NMs have signed their Statement of Obligation, create charges for those who signed.

[ ]  ***New Members:*** Monitor greekbill to assure all NMs have signed their Dues & Fees contracts within 10 days.

[ ]  ***New Members:*** Attend Week 2 of the New Member Pursuit and per the New Member Pursuit Facilitator’s Guide present fiscal overview of Delta Gamma operations and financial obligations to new members.

[ ]  ***Live-In*** ***Housed Chapter:*** Make sure all members moving into the house have signed their Room Agreements. No one may move in unless she has signed the agreement through greekbill.

[ ]  ***Live-In*** ***Housed Chapter:*** Ensure director of house management holds a special meeting with members or new members moving into the house for the first time. Explain the operation of the house and the house resident rules.

[ ]  ***Housed Chapter:*** Ensure director of house management posts house rules in each room or issues a copy for each member's notebook. A copy should also be posted in a public area of the chapter facility.

[ ]  ***Anchor Games:*** Complete the Fundraising Finance Report Form – Collegiate, on Anchorbase, along with the vp: Foundation no more than two weeks after the fundraising event was held. Print and send the form, along with all checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221.

[ ]  ***Anchor Games:*** Confirm the #332/Anchor Games account has a zero balance within 14 days of the event.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit member account adjustment (MAA) requests for billing group changes or to remove dues and fees for members that have left the chapter.

[ ]  Review completed MAA for accuracy on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive before the 10th of the month.

[ ] Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vice president: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at Executive Offices (EO).

[ ]  ***On the 11th***, ensure Automatic Probation Notifications (APNs) are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a *Statement of Obligation Review (SOR)*.)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with Honor Board to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file *Statement of Obligation Reviews (SOR)* for any member who has not paid any bill submitted on greekbill that was due on the first of the month.

[ ]  Submit Bad Debt Write-Offs for any alumnae/non-member with debt of less than $750 or start collections process for secured amounts over $750. Alumnae will be placed on the list for Council to review for expulsion. Check with chapter operations adviser (COA), Regional Finance Specialist (RFS)/New Chapter Finance Coordinator (NCFC) and your Executive Offices collegiate finance consultant to confirm before moving forward.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members and alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with chapter management team (CMT).

[ ]  Attend all house corporation board meetings along with the chapter president and director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

## vice president: communications

[ ]  Upload chapter meeting minutes in Anchorbase for the Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC).

[ ]  Instruct all officers to review and update the Anchorbase Facts Sheets and chapter roster by September 30.

[ ]  Upload revised Bylaws and Standing Rules (BLSR) in Anchorbase after they are voted on by the chapter (if they were not completed in the spring).

[ ]  Email 75-word report and large file size (non-compressed) photos by October 15 for the *ANCHORA*. Email anchora@deltagamma.org.

[ ]  Review summer and fall issues of the *ANCHORA* in chapter and new member meetings.

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Update member information and review chapter roster in Anchorbase. If there are any roster changes that need to be made, please complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  Update all fact sheets in Anchorbase (under *Tasks That May Be Completed At Any Time).*

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Ensure chapter website is up to date, and chapter contact information is correct in the chapter locator search results on the Delta Gamma website.

[ ]  Review *Social Media Policy* at chapter meeting and new member meeting.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vice president: finance.

**VICE PRESIDENT: PROGRAMMING**

[ ]  Prepare for the adviser recognition or appreciation, if holding in the fall.

[ ]  Ensure director of alumnae relations plans for and holds a collumnae event, if holding in the fall.

[ ]  Plan for and hold the Senior Recommitment Ceremony for members graduating fall term.

[ ]  Plan for and hold *Article II Chapter Goal Setting* starting with Step 2 (also known as Article II Assessment).

[ ]  Plan for the Alcohol Skills Training Program (ASTP) visit once every three years; contact Executive Offices if you are unsure when your chapter will next receive it.

**Monthly Tasks:**

[ ]  Present the RCS/CAC/NCC approved calendar to the chapter for their approval. The vote to approve the calendar should occur the first business meeting following RCS/CAC/NCC approval. No additional anchored (required) events may be scheduled without RCS/CAC/NCC approval (if not completed during spring term).

[ ]  Introduce GreekLifeEdu program and its requirements to new members during Week 2 of the New Member Pursuit. Ensure each new member passes part 1 of the GreekLifeEdu test with a score of 75 percent by chapter’s Initiation Authorization deadline.

[ ]  Distribute *Master Calendar* to members and advisers.

[ ]  Review calendar to prepare for scheduled events this month, and notify the chapter of any changes.

[ ]  Begin planning the *Master Calendar* with CMT for the spring semester/winter quarter. Due November 1 (or the date specified by the RCS/CAC/NCC).

[ ] Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar, if applicable.

## vice president: member education

[ ]  Complete the *Campus Resource Worksheet* located in the Delta Gamma Library and send it to all of joint CMT, your Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CSC)/New Chapter Coordinator (NCC) and colldept@deltagamma.org by October 1.

[ ]  Review the completed *Campus Resource Worksheet* at the first chapter meeting of the year and post it in a visible location in the chapter house/lodge, if housed. Additionally, please be sure to distribute it electronically to all members and new members.

[ ]  Download and copy the current, revised *New Member Pursuit Notebook* for each anticipated new member.

[ ]  Review and complete *Inspiration & Initiation (I&I) Checklist* with director of rituals.

[ ]  Distribute *Parent Welcome Letter*, sent to you by EO, to all new members.

[ ]  Ensure the director of new members completes the New Member Entry in Anchorbase by its due date.

[ ]  Meet with scholarship committee and scholarship adviser to develop programming goals for the Chapter Scholarship Enrichment Program. Use the *Scholarship Handbook* as a guide, located in the Delta Gamma library.

[ ]  Ask the director of scholarship to: 1) complete the Scholarship Fact Sheet/University Statistics, 2) update the Scholarship Enrichment Program and Requirements, and 3) submit members’ grades in Anchorbase for the spring term, due October 1. These do not appear on the Anchorbase task list and are only accessed by going to the due date on the chapter’s Anchorbase calendar.

[ ]  Ensure the director of rituals completes the Inspiration and Initiation Outline in Anchorbase for the RCS/CAC/NCC to approve six (6) weeks prior to Initiation date.

[ ]  Ensure the director of rituals reviews responsibilities for Initiation in the *Collegiate Chapter Officers Manual (CCOM)*, and the *Initiation Ceremony* with the president, vice president: member education and the vice president: communications.

[ ]  Plan necessary formal and informal rituals for new members with the director of rituals.

[ ]  Check ritual equipment and supplies. Contact house corporation to order or replace equipment. Create an inventory list with all supplies and equipment and place it inside the door of the rituals closet and maintain for house corporation use. Send any ritual curtains that are replaced to the archivist at Executive Offices to ensure proper disposal.

[ ]  Ensure all officers are completing Anchorbase tasks.

[ ]  Work with the director of new members and appropriate advisers to facilitate Big Sister training during Week 4, plan and assign big/little sisters, and Big/Little Reveal during Week 5 of the New Member Pursuit.

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/member education adviser approval. **Due by designated deadline.**

[ ]  Ensure the Candidates List is completed in Anchorbase. **Due by chapter’s Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification on Anchorbase the day after Initiation.

[ ]  Conduct Week 9 of the New Member Pursuit, including the Initiation Review, at the first formal meeting following Initiation and assist new members in ordering badges from the official Fraternity jeweler.

[ ]  Ensure continuous member education is implemented and noted on calendar.

**VICE PRESIDENT: MEMBERSHIP**

**Fall Primary Recruitment Chapters:**

**Before Recruitment**

[ ]  When legacy Recommendation Forms are received, send a thank you note acknowledging you received the form.

[ ]  Send thank you notes/emails to alumnae who submit Recommendation Forms as soon as forms are received. See the Delta Gamma library for example notes.

[ ]  Evaluating Committee (EVC) meets to evaluate all Recommendation Forms based on the five points of the Membership Star.

[ ]  Set up recruitment management program (MyVote) and enter appropriate sponsorship information.

[ ]  Finalize plans for and implement *Recruitment Preparation Workshop (RPW) – Prep Week*.

[ ]  Finalize all plans for recruitment.

**During Recruitment**

[ ]  Lead chapter recruitment. Ensure you and other members of EVC meet legacies and other potential new members (PNMs).

[ ]  Contact RCRS if the chapter wants to file a recruitment infraction or if a recruitment infraction has been filed against the chapter.

**After Recruitment**

[ ]  Immediately contact RCRS/CRC/NCRC with results.

[ ]  Complete Primary Recruitment Evaluation within 10 days of Bid Day in Anchorbase.

[ ]  For PNMs who pledged DG – alphabetize and give Recommendation Forms to the vp: member education to upload to Anchorbase.

[ ]  For PNMs pledged to another group – destroy Recommendation Forms.

[ ]  For potential Continuous Open Bidding (COB) candidates – file Recommendation Forms alphabetically for future use, but destroy all unused forms at the end of the school year.

[ ]  Destroy (do not recycle un-shredded paper) voting sheets, confidential notes from EVC meetings and any other confidential paperwork.

[ ]  **Delete** any confidential electronic documents; this includes any shared documents in tools such as Google Drive.

[ ]  Contact RCRS/CRC/NCRC before filing recruitment infractions; contact her immediately if a recruitment infraction is filed on Delta Gamma.

[ ]  Evaluate recruitment effort with new members, members, recruitment counselors, advisers and EVC.

[ ]  Complete all recruitment Post-Event Summaries in Anchorbase.

**Deferred Recruitment Chapters:**

[ ]  Review previous recruitment evaluations.

[ ]  Plan for primary recruitment and appoint all committees, assistants and event chairs.

[ ]  Meet with Fraternity/Sorority Advisor (FSA) to get feedback on chapter’s recruitment effort. (See *Recruitment Confidential.*)

[ ]  Begin preparation for *RPW #2 - Recruitment Fundamentals* (Note: if your calendar allows, you may conduct this workshop during these months).

[ ]  Update chapter website with dates and mailing addresses – as soon as dates for primary recruitment are known.

[ ]  Update Anchorbase calendar to ensure recruitment dates are accurate – as soon as dates for primary recruitment are known.

[ ]  Submit updated primary recruitment information to the Delta Gamma website by November 1. Ensure that you have access to the chapter designated email to receive online Recommendation Forms prior to/during primary recruitment. See the email address listed in the *Recruitment Calendar and Contacts* in the Delta Gamma library.

**COB:**

[ ]  Contact RCRS/CRC/NCRC if eligible for COB.

[ ]  Review and implement COB Action Plan.

[ ]  Immediately following COB, complete COB/Informal Recruitment Report in Anchorbase (Note: you must have COB Bid Day entered on your chapter Anchorbase calendar.)

[ ]  Contact RCRS/CRC/NCRC with COB results.

**All Chapters:**

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Report and submit to your collegiate development specialist (CDS) at Executive Offices (EO).

## vice president: Panhellenic

[ ]  Upload a copy of the College Panhellenic recruitment booklet, recruitment rules and Panhellenic Constitution and Bylaws for the current year to Anchorbase annually.

[ ]  Review Panhellenic recruitment guidelines with your chapter prior to recruitment.

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to CMT and chapter, as appropriate.

[ ]  Immediately notify your PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

[ ]  Complete the Panhellenic Update and the Monthly Panhellenic Report in Anchorbase.

## vice president: Foundation

[ ]  Check the Anchorbase calendar to ensure all Signature and Non-Signature Foundation fundraisers are scheduled on the calendar for the semester/term so all required forms are populated on Anchorbase.

[ ]  Plan and implement Do Good Service for Sight volunteer event(s) for the year. Strive to offer opportunities that allow members to complete a minimum of eight Do Good Hours per year to fulfill their membership responsibilities.

[ ]  Track all Foundation fundraisers and community service events in order to apply for the H.K. Stuart Spirit of Service Award (Convention years only).

[ ]  Ensure that members are aware of the Collegiate Giving Society: Special Foundation recognition for members who complete eight or more Do Good: Service for Sight Hours or make an individual gift of any size to the Foundation in an academic year.

[ ]  Publicize the availability and deadlines of Foundation Individual Member Support opportunities, including merit-based undergraduate scholarships and graduate fellowships, Sisters Helping Sisters: Need-Based Scholarships, and interest-free loans, by directing members to [deltagamma.org/foundation/applications](http://www.deltagamma.org/foundation/applications).

**Fall Primary Recruitment Chapters:**

[ ]  Present and indicate on chapter calendar, during Recruitment Prep Week, Foundation Education for Recruitment: Let’s Talk Philanthropy. After the presentation, complete the task in Anchorbase labeled *Foundation Education for Recruitment: Let’s Talk Philanthropy Summary.*

[ ]  Assist with facilitating Week 4 of the New Member Pursuit, The Ruth Billow Story, to educate new members about our Foundation.

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# October

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *CMT Planning Tool* with CMT.

[ ]  Request assistance from your Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) regarding any special problems.

[ ]  Provide education to chapter about chapter officer responsibilities, slating and election procedures.

[ ]  Complete slating procedure and conduct Nominating Committee meeting.

[ ]  Conduct election of officers as required in the chapter bylaws, which should be no later than the second-to-last meeting of the term.

[ ]  Ensure all Initiation Authorization tasks are completed, if applicable, in order to receive authorization from Executive Offices.

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director.

[ ]  Attend all house corporation meetings with the vp: finance and the director of house management.

## vice president: social standards

[ ]  Submit *Honor Board Weekly Meeting Minutes* and *Weekly Summary Sanction Log* to RCS/CAC/NCC on a weekly basis

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas for Honor Board to address trends.

[ ]  Plan for a CDC visit, if applicable.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

[ ]  Continue preparation for application for the *Patricia Peterson Danielson Award (PPD) Application* due to RCS/CAC/NCC by December 1 (highly recommended).

[ ]  Compile/complete the *Honorable Chapter Award* application to submit to the ATC and RCS/CAC/NCC by November 1.

[ ]  Complete upcoming awards applications, if applicable.

## vice president: finance

[ ]  ***New Members:*** New member information will be synced to greekbill from Anchorbase. Once new members have signed their Statement of Obligation, create charges for those who signed.

[ ]  ***New Members:*** Monitor greekbill to assure all new members have signed Dues & Fees contracts within 10 days.

[ ]  ***New Members:*** Attend Week 2 of the New Member Pursuit and per the New Member Pursuit Facilitator’s Guide present fiscal overview of Delta Gamma operations and financial obligations to new members.

[ ]  ***Initiation:*** Complete finance part of the *Inspiration and Initiation Checklist* to affirm all required fees have been properly collected.

[ ]  ***Initiation:*** Within 60 days following Initiation, vp: finance will receive an invoice for the 1st payment of the house corporation fee for chapters with fall primary recruitment; the balance or 2nd payment will be billed before the end of the school year. Once received, pay the invoice promptly, before the stated due date.

[ ]  ***Anchor Games:*** Complete the Fundraising Finance Report Form – Collegiate, on Anchorbase, along with the vp: Foundation no more than two weeks after the fundraising event was held. Print and send the form, along with all checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221.

[ ]  ***Anchor Games:*** Confirm the #332/Anchor Games account has a zero balance within 14 days of the event.

[ ]  ***Live-In*** ***Housed Chapter:*** Assign Room Contracts on greekbill for signature for the following school year. Assign/secure signatures within ten days of issue. If chapter needs an extension, check with RFS/NCFC.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit MAA requests for billing group changes or to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees Contracts. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive **before the 10th of the month**.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at EO.

[ ]  ***On the 11th***, ensure APNs are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a *Statement of Obligation Review (SOR)*.)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with Honor Board to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file SORs for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month.

[ ]  Submit Bad Debt Write-Offs for any alumna/non-member with debt of less than $750 or start collections process for secured amounts over $750. Alumnae will be placed on the list for Council to review for expulsion. Check with COA, RFS/NCFC and CFC to confirm before moving forward.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members and alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with CMT.

[ ]  Attend all house corporation board meetings along with the chapter president director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

## vice president: communications

[ ]  Upload chapter meeting minutes in Anchorbase for the RCS/CAC/NCC.

[ ]  Assist director of alumnae relations in planning and publishing a newsletter informing alumnae, members' families and regional officers about chapter activities, events and accomplishments. For electronic communications, contact AlumnaeDept@deltagamma.org for a list of chapter alumnae email addresses or use the member search function on DG website profile.

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Ensure all changes to Anchorbase roster are made by per capita billing deadline (this deadline changes every year; please check with your collegiate development specialist (CDS) at Executive Offices regarding what the deadline is for the current year). To submit roster changes, complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: finance.

## vice president: programming

[ ]  Publicize Collegiate Development Consultant (CDC) job opportunity. Applications are due on the date specified by Executive Offices (EO) (usually around January 1).

[ ]  Review calendar to prepare for scheduled events this month and notify the chapter of any changes.

[ ]  Ensure the director of alumnae relations plans and publishes a newsletter informing alumnae, members' families and regional officers about chapter activities, events and accomplishments.

[ ]  If not completed prior, introduce GreekLifeEdu program and its requirements to new members during Week 2 of the new member period. Ensure each new member passes part one of the GreekLifeEdu test with a score of 75 percent by Initiation Authorization deadline.

[ ]  Submit *Master Calendar* via Anchorbase to Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) for approval by November 1 for spring semester/winter quarter (or the date specified by RCS/CAC/NCC).

[ ]  Ensure all officers complete Post-Event Summaries for their events on the calendar, if applicable.

## vice president: member education

[ ]  Conduct Vote to Initiate in Week 5 of the New Member Pursuit. *Note: At least three weeks prior to the scheduled Initiation, the names of new members who are in the process of meeting the guidelines established by the New Member Pursuit must be presented for the three-fourths vote of approval from the chapter (refer to Constitution Article V., Section 1. C.5). A chapter member may not vote “no” for a proposed candidate who has followed the guidelines as described in the Delta Gamma Constitution and the New Member Pursuit unless the member has submitted a completed and signed Statement of Obligation Review (SOR) to the vice president: social standards and the issue described therein has been addressed in a timely manner by the Honor Board.*

[ ]  Ensure the director of scholarship provides updated campus academic resource list to new members.

[ ]  Ensure the director of scholarship 1) update Scholarship Enrichment Program and Requirements, 2) updates the University Rankings/Statistics and 3) completes the Submit Grades Task for spring term in Anchorbase. These tasks do NOT appear on the Anchorbase Task List, and may only be accessed by looking on the due date on the calendar. Due by October 1.

[ ]  Ask the director of rituals to complete the *Inspiration and Initiation Outline* in Anchorbase for the Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) to approve six weeks prior to Initiation date.

[ ]  Continue necessary formal and informal rituals for new members.

[ ]  Ensure all officers complete Anchorbase tasks.

[ ]  Ensure the director of rituals reviews responsibilities for Initiation found in the *Collegiate Chapter Officers Manual (CCOM)* and practices the *Initiation Ceremony* with the president, vice president: programming and vice president: communications.

[ ]  Ensure the director of new members completes the New Member Entry in Anchorbase by its due date.

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/member education adviser approval. **Due by designated deadline.**

[ ]  Complete the Candidates List in Anchorbase. **Due by the Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification in Anchorbase the day after Initiation.

[ ]  Conduct Week 9 of the New Member Pursuit, including the Initiation Review, at the first formal meeting following Initiation and assist new members in ordering badges from the official Fraternity jeweler.

[ ]  Conduct scheduled member education activities during chapter meetings.

## vice president: membership

**Fall Primary Recruitment Chapters:**

**Before Recruitment**

[ ]  When legacy Recommendation Forms are received, send thank you notes acknowledging you received the form.

[ ]  Send thank you notes/emails to alumnae who submit Recommendation Forms as soon as forms are received. See the Delta Gamma library for example notes.

[ ]  Evaluating Committee (EVC) meets to evaluate all Recommendation Forms based on the five points of the Membership Star.

[ ]  Set up recruitment management program (MyVote) and enter appropriate sponsorship information.

[ ]  Finalize plans for and implement *RPW – Prep Week* (if not done so already).

[ ]  Finalize all plans for recruitment.

**During Recruitment**

[ ]  Lead chapter recruitment. Ensure you and other members of EVC meet legacies and other potential new members (PNMs).

[ ]  Contact RCRS/CRC/NCRC to request permission if chapter wishes to release a legacy, prior to making the release.

[ ]  Contact RCRS/CRC/NCRC if the chapter wants to file a recruitment infraction or if a recruitment infraction has been filed against the chapter.

**After Recruitment**

[ ]  Immediately contact RCRS/CRC/NCRC with results.

[ ]  Complete Primary Recruitment Evaluation within 10 days of Bid Day in Anchorbase.

[ ]  For PNMs who pledged Delta Gamma – alphabetize and give Recommendation Forms to the vp: member education to upload to Anchorbase.

[ ]  For PNMs pledged to another group – destroy Recommendation Forms.

[ ]  For potential COB candidates – file Recommendation Forms alphabetically for future use, but destroy all unused forms at the end of the school year.

[ ]  Destroy (do not recycle un-shredded paper) voting sheets, confidential notes from EVC meetings and any other confidential paperwork.

[ ]  **Delete** any confidential electronic documents; this includes any shared documents in tools such as Google Drive.

[ ]  Contact RCRS/CRC/NCRC before filing recruitment infractions; contact her immediately if a recruitment infraction is filed on Delta Gamma.

[ ]  Evaluate recruitment effort with new members, members, recruitment counselors, advisers and EVC.

[ ]  Complete all recruitment Post-Event Summaries in Anchorbase.

**Deferred Recruitment Chapters:**

[ ]  Order all recruitment supplies.

[ ]  Oversee all recruitment preparations, checking in regularly with recruitment committees.

[ ]  Finalize plans and conduct *RPW #2 - Recruitment Fundamentals*, if not done so already.

[ ]  Submit updated primary recruitment information to the Delta Gamma website by November 1. Ensure that a chapter specific email address is provided to ensure receiving Recommendation Forms prior to/during primary recruitment.

[ ]  Update chapter website with dates and mailing addresses – as soon as dates for primary recruitment are known.

[ ]  Update Anchorbase calendar to ensure recruitment dates are accurate – as soon as dates for primary recruitment are known.

[ ]  When legacy Recommendation Forms are received, send a letter to the legacy’s sister/mother/grandmother who provided Recommendation Forms, notifying them of the Fraternity policy on legacies.

**COB:**

[ ]  Contact RCRS/CRC/NCRC if eligible for COB.

[ ]  Review and implement COB Action Plan.

[ ]  Immediately following COB, complete COB/Informal Recruitment Report in Anchorbase (Note: you must have a COB Bid Day entered on your chapter Anchorbase calendar.)

[ ]  Contact RCRS/CRC/NCRC with COB results.

[ ]  Develop COB Action Plan for winter/spring COB and submit on Anchorbase by November 1.

**All Chapters:**

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Report and submit to your collegiate development specialist (CDS) at Executive Offices (EO).

## vice president: Panhellenic

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to chapter management team (CMT) and chapter, as appropriate.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

## vice president: Foundation

[ ]  October is Blindness Awareness Month!

[ ]  Celebrate World Sight Day on the second Thursday of October.

[ ]  Celebrate White Cane Safety Day on October 15.

[ ]  Complete Log Do Good Hours task in Anchorbase on October 15 for first progress report and upload the tracking spreadsheet.

[ ]  Publicize the availability and qualifications for Sisters Helping Sisters: Need-Based Scholarships. Applications are received online through the SmarterSelect website and are accepted and reviewed on a rolling basis. Application information can be viewed at <http://www.deltagamma.org/foundation/applications>.

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# November

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *CMT Planning Tool* with CMT.

[ ]  Begin preparation for Formal Transition Workshop including schedule, speakers, etc. All incoming and outgoing officers are required to attend the Formal Transition Workshop. Be sure to use the Formal Transition Workshop agenda in the *Changing of the Tides* handbook.

[ ]  Complete slating procedure and conduct Nominating Committee meeting.

[ ]  Conduct election of officers as required in the chapter bylaws, which should be no later than the second to last meeting of the term.

[ ]  Ensure all Initiation Authorization tasks are completed, if applicable, in order to receive authorization from Executive Offices.

[ ]  Post-election: update the Anchorbase officer/adviser roster immediately after transition. **(Note: change the president position last to ensure you have access to edit the roster)**.

[ ]  Ensure chapter has met requirements for good standing to maintain eligibility for consideration for the *Patricia Peterson Danielson Award* submitted December 1 (optional).

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director.

[ ]  Attend all house corporation meetings with the vp: finance and the director of house management.

## vice president: social standards

[ ]  Begin planning for transitioning as part of the Slating, Elections, Transition (SET) process for the next vp: social standards and Honor Board officers.

[ ]  Submit *Honor Board Weekly Meeting Minutes* and *Weekly Summary Sanction Log* to RCS/CAC/NCC on a weekly basis.

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas for Honor Board to address trends.

[ ]  Plan for a CDC visit, if applicable.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

[ ]  Submit application for the *Patricia Peterson Danielson Award (PPD) application* due to RCS/CAC/NCC by December 1 (highly recommended).

[ ]  Compile/complete the *Honorable Chapter Award* application to submit to the ATC and RCS/CAC/NCC by November 1.

[ ]  Complete upcoming awards applications, if applicable.

## vice president: finance

[ ]  Pay per capita dues for each member and new member on the Anchorbase roster to Executive Offices as per the invoice from Delta Gamma Fraternity.

[ ]  ***Initiation:*** Complete finance part of the *Inspiration and Initiation Checklist* to affirm all required fees have been properly collected.

[ ]  ***Initiation:*** Within 60 days following Initiation, vp: finance will receive an invoice for the 1st payment of the house corporation fee for chapters with fall primary recruitment; the balance or 2nd payment will be billed before the end of the school year. Once received, pay the invoice promptly, before the stated due date.

[ ]  ***New Officers:*** Assign Officer Contracts on greekbill for the following year for newly-elected officers and monitor for signatures.

[ ]  ***Anchor Games:*** Complete the Fundraising Finance Report Form – Collegiate, on Anchorbase, along with the vp: Foundation no more than two weeks after the fundraising event was held. Print and send the form, along with all checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221.

[ ]  ***Anchor Games:*** Confirm the #332/Anchor Games account has a zero balance within 14 days of the event.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit MAA requests for billing group changes or to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees Contracts. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive **before the 10th of the month**.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at EO.

[ ]  ***On the 11th***, ensure APNs are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a *Statement of Obligation Review (SOR)*.)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with Honor Board to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file SORs for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month.

[ ]  Submit Bad Debt Write-Offs for any alumna/non-member with debt of less than $750 or start collections process for secured amounts over $750. Alumnae will be placed on the list for Council to review for expulsion. Check with COA, RFS/NCFC and CFC to confirm before moving forward.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members and alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with CMT.

[ ]  Attend all house corporation board meetings along with the chapter president director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

## vice president: communications

[ ]  Upload chapter meeting minutes in Anchorbase for the RCS/CAC/NCC.

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Update member information and review chapter roster in Anchorbase. If there are any roster changes that need to be made, please complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: finance.

## vice president: programming

[ ]  If not completed prior, introduce GreekLifeEdu program and its requirements to new members during Week 2 of the new member period. Ensure each new member passed part one of the GreekLifeEdu test with a score of 75 percent by Initiation Authorization deadline.

[ ]  Present the RCS/CAC/NCC approved calendar to the chapter for their approval. The vote to approve the calendar should occur the first business meeting following RCS/CAC/NCC approval. No additional anchored (required) events may be scheduled without RCS/CAC/NCC approval.

[ ]  Review calendar to prepare for scheduled events this month and notify the chapter of any changes.

[ ]  Ensure all officers complete Post-Event Summaries for their events on the calendar, if applicable.

## vice president: member education

[ ]  Download and copy the current, revised *New Member Pursuit Notebook* for each anticipated new member for deferred recruitment and COB.

[ ]  Ensure the director of new members completes the New Member Entry in Anchorbase by its due date.

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/member education adviser approval. **Due by designated deadline.**

[ ]  Complete the Candidates List in Anchorbase. **Due by the Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification in Anchorbase the day after Initiation.

[ ]  Conduct Week 9 of the New Member Pursuit, including the Initiation Review, at the first formal meeting following Initiation and assist new members in ordering badges from the official Fraternity jeweler.

[ ]  Ensure the director of rituals completes the Inspiration and Initiation Outline in Anchorbase for the RCS/CAC/NCC to approve six weeks prior to Initiation date.

[ ]  Ensure the director of rituals reviews responsibilities for Initiation found in the *CCOM* and practices the *Initiation Ceremony* with the president, vice president: programming and vice president: communications.

[ ]  Ensure all officers complete Anchorbase tasks.

[ ]  Conduct scheduled member education activities.

## vice president: membership

**Deferred Recruitment Chapters:**

[ ]  When legacy Recommendation Forms are received, send thank you notes acknowledging you received the form.

[ ]  Send thank you notes/emails to alumnae who submit Recommendation Forms as soon as forms are received. See the Delta Gamma library for example notes.

[ ]  Send recruitment information letter to State Sponsorship Chair (SSC), City Sponsorship Chair (CSC) in your state and any CSC from whom you receive requests or have received Recommendation Forms from in the past. Include recruitment dates, legacy information and contact information (name, address, telephone and email) for the director of recruitment records.

[ ]  Finalize and implement *RPW #2 - Recruitment Fundamentals*.

[ ]  Upload Membership Selection Criteria (MSC) Worksheet to Anchorbase.

[ ]  Send thank you notes/emails to alumnae who submit Recommendation Forms.

[ ]  Start plans for *RPW - Prep Week*.

[ ]  Finalize all plans for recruitment.

[ ]  Order recruitment supplies.

[ ]  Check with director of recruitment records on responsibilities such as sending requests to SSC and CSC and acknowledging *Recommendation Forms*.

[ ]  Work with director of recruitment records to become familiar with MyVote in preparation for spring recruitments.

**Fall Primary Recruitment Chapters:**

[ ]  Plan and conduct *RPW #1 - Recruitment Introduction*, if not done so already.

**COB:**

[ ]  Submit COB Action Plan on Anchorbase.

**All Chapters:**

[ ]  Send RCRS/CRC/NCRC an introduction email with contact information for new vp: membership.

[ ]  Prepare for officer transition.

[ ]  Ensure that the email account used for Sponsors Forms is transitioned to the incoming director of recruitment records.

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Report and submit to your CDS at EO.

## vice president: Panhellenic

[ ]  Update Panhellenic Fact Sheet by December 1.

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to CMT and chapter, as appropriate.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your RCRS and PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Chapters with deferred recruitment send a copy of the College Panhellenic recruitment booklet, recruitment rules and Panhellenic Constitution and Bylaws for the current year to the PSS and RCRS/CRC/NCRC.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

[ ]  Send RCRS/CRC/NCRC and PSS an e-mail introduction with contact information for the new vp: Panhellenic.

## vice president: Foundation

[ ]  Celebrate Veterans Day/Canadian Remembrance Day on November 11 with a Do Good: Service for Sight event serving veterans who have experienced vision loss.

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# December

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *CMT Planning Tool* with CMT.

[ ]  Prepare for Formal Transition Workshop including schedule, speakers, etc. All incoming and outgoing officers are required to attend the Formal Transition Workshop. Be sure to use the Formal Transition Workshop agenda in the *Changing of the Tides* handbook.

[ ]  Post-election results in Anchorbase officer/adviser roster immediately after transition. **(Note: change the president position last to ensure you have access to edit the roster).**

[ ]  Ensure all Initiation Authorization tasks are completed, if applicable, in order to receive authorization from Executive Offices.

[ ]  Ensure chapter has met requirements for good standing to maintain eligibility for consideration for the *Patricia Peterson Danielson Award* submitted December 1 (optional).

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director.

[ ]  Attend all house corporation meetings with the vp: finance and the director of house management.

## vice president: social standards

[ ]  Submit the *End-of-Term Summary Sanction Log* to the RCS/CAC/NCC within three (3) days of the last Honor Board meeting of the term.

[ ]  Finalize the transition planning as part of the Slating, Elections, Transition (SET) process for the next vp: social standards and Honor Board officers.

[ ]  Send a thank-you note to your Honor Board adviser and RCS/CAC/NCC as you complete your term, as part of adviser appreciation.

[ ]  Submit *Honor Board Weekly Meeting Minutes* and *Weekly Summary Sanction Log* to RCS/CAC/NCC on a weekly basis.

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas for Honor Board to address trends.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

[ ]  Submit application for the *PPD Award application* due to RCS/CAC/NCC by December 1 (highly recommended).

[ ]  Complete upcoming awards applications, if applicable.

## vice president: finance

[ ]  Update member information and member status in greekbill to account for member status changes during the break and confirm the roster in Anchorbase corresponds to the greekbill roster.

[ ]  ***New Officers:*** Change names and signatures on all bank accounts during transition by going to the bank in person. Change passwords and login information for online banking and make sure all signers on the account have the new information.

 [ ]  ***New Officers:*** Assign new officers their roles in greekbill and in the Honor Board module in greekbill once transactions are completed.

[ ]  ***New Officers:*** Assign Officer Contracts on greekbill for the following year for newly-elected officers and monitor for signatures.

[ ]  ***Initiation:*** Within 60 days following Initiation, vp: finance will receive an invoice for the 1st payment of the house corporation fee for chapters with fall primary recruitment; the balance or 2nd payment will be billed before the end of the school year. Once received, pay the invoice promptly, before the stated due date.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit MAA requests for billing group changes or to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees contracts. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive **before the 10th of the month**.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at EO.

[ ]  ***On the 11th***, ensure APNs are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a *Statement of Obligation Review (SOR)*.)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with HB to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file an SOR for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month.

[ ]  Submit Bad Debt Write-Offs for any alumnae/non-member with debt of less than $750 or start collections process for secured amounts over $750. Alumnae will be placed on the list for Council to review for expulsion. Check with COA, RFS/NCFC and CFC to confirm before moving forward.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members and alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with CMT.

[ ]  Attend all house corporation board meetings along with the chapter president and director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

## vice president: communications

[ ]  Upload chapter meeting minutes in Anchorbase for the RCS/CAC/NCC.

[ ]  Encourage graduating seniors to change their addresses with EO by emailing addresschange@deltagamma.org or by logging into the Delta Gamma website and updating their profiles.

[ ]  Remind members of their responsibility to keep EO informed of changes in name or address/contact information.

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Ensure graduation years are correct on your Anchorbase roster for your December graduates.

[ ]  Submit December graduates on Anchorbase by December 31.

[ ]  Update member information and review chapter roster in Anchorbase. If there are any roster changes that need to be made, please complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Review *Social Media Policy* with chapter.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: finance.

[ ]  Share all social media, website and email accounts and passwords with incoming officer (even if account hasn’t been used recently).

## vice president: programming

[ ]  If not completed prior, introduce GreekLifeEdu program and its requirements to new members during Week 2 of the new member period. Ensure each new member passes part one of the GreekLifeEdu test with a score of 75 percent by Initiation Authorization deadline.

[ ]  If not approved prior, present the RCS/CAC/NCC approved calendar to the chapter for their approval. The vote to approve the calendar should occur the first business meeting following RCS/CAC/NCC approval. No additional anchored (required) events may be scheduled without RCS/CAC/NCC approval (if not completed during spring term).

[ ]  Check in with director of alumnae relations to ensure she is working with the local alumnae group to attend/plan a Founders Day celebration on or near March 15. If your chapter does not have a director of alumnae relations, appoint a Founders Day chairman and/or member to work with local alumnae group to plan Founders Day celebration on or near March 15.

[ ]  Review calendar to prepare for scheduled events this month and notify the chapter of any changes.

[ ]  Ensure all officers complete Post-Event Summaries for their events, if applicable.

## vice president: member education

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/member education adviser approval. **Due by designated deadline.**

[ ]  Ensure the Candidates List is completed in Anchorbase. **Due by the Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification in Anchorbase on the day after Initiation.

[ ]  Conduct scheduled member education activities during chapter meetings.

[ ]  Ensure the director of rituals completes the Inspiration and Initiation Outline in Anchorbase for the RCS/CAC/NCC approval six weeks prior to Initiation date.

[ ]  Conduct scheduled member education activities.

## vice president: membership

**Deferred Recruitment Chapters:**

[ ]  When legacy Recommendation Forms are received, send thank you notes acknowledging you received the form.

[ ]  Send thank you notes/emails to alumnae who submit Recommendation Forms as soon as forms are received. See the Delta Gamma library for example notes.

[ ]  Finalize plans for *RPW - Prep Week*.

[ ]  Finalize all plans for recruitment.

[ ]  Order recruitment supplies.

[ ]  Check with director of recruitment records on responsibilities such as sending requests to SSC and CSC and acknowledging Recommendation Forms.

[ ]  Work with director of recruitment records to become familiar with MyVote in preparation for spring recruitment.

**Fall Primary Recruitment Chapters:**

[ ]  Plan and conduct *RPW #1 - Recruitment Introduction*, if not done so already.

**COB:**

[ ]  Finalize all plans for winter/spring COB events.

**All Chapters:**

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Report and submit to your collegiate development specialist (CDS) at EO.

## vice president: Panhellenic

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to CMT and chapter, as appropriate.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

[ ]  Update Panhellenic Fact Sheet in Anchorbase.

## vice president: Foundation

[ ]  Work with your vp: finance to ensure that all fall term Foundation fundraising dollars have been sent to Executive Offices with a completed and printed Fundraising Finance Report Form (see below) by December 15.

[ ]  Complete Log Do Good Hours task in Anchorbase on December 15 for a progress report and upload the tracking spreadsheet.

[ ]  Provide the incoming vice president: Foundation the past year’s tracking forms and records of Do Good Hours completed by members.

[ ]  Encourage the incoming vice president: Foundation to apply for the H.K. Stuart Spirit of Service Award (Convention award). Application is due May 1 during Convention years and can be found at [www.deltagamma.org/foundation/applications](file:///C%3A%5CUsers%5CKrystina.Novotny%5CDropbox%5CPresidents%20Calendar%5Cwww.deltagamma.org%5Cfoundation%5Capplications).

[ ]  Publicize the availability and deadlines of Foundation Individual Member Support opportunities, including merit-based undergraduate scholarships and graduate fellowships, Sisters Helping Sisters: Need-Based Scholarships, and interest-free loans, by directing members to [deltagamma.org/foundation/applications](http://www.deltagamma.org/foundation/applications). Merit-based undergraduate scholarship and graduate fellowship applications open December 1.

[ ]  If your chapter intends to sponsor a one-time scholarship or fellowship, send your donation money and award information to the Foundation Programs Manager at EO by December 31. Visit the website library for more information on [funding a merit-based undergraduate scholarship or graduate fellowship](https://www.deltagamma.org/library/formApplication/funding-merit-based-scholarship-fellowship) and [funding a Sisters Helping Sisters: Need-Based Scholarship](https://www.deltagamma.org/library/procedureProcess/funding-shs-scholarship).

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# January

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *CMT Planning Tool* with chapter management team.

[ ]  Ensure all officers and advisers have appropriate and current handbooks and a copy of the current *Collegiate Chapter Officers Manual (CCOM)*.

[ ]  Direct officer transition in conjunction with the outgoing president.

[ ]  Review the *Recommended Practices for Managing Individual Emotional/Mental Health Concerns*.

[ ]  Postelection results on Officer/Adviser Roster in Anchorbase.

[ ]  Develop committee structure and assign membership to accommodate newly elected/appointed officers and directors based upon committee applications of members/new members.

[ ]  Begin review of chapter Bylaws and Standing Rules (BLSR) with all chapter officers, using current model. Send to Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) for approval.

[ ]  Review the CDC Visit Report from the previous term, if applicable, and identify areas for improvement CMT can focus on this term.

[ ]  Receive Initiation Authorization from Executive Offices (EO) before Initiation may be held.

[ ]  Begin promoting and identifying Lewis Institute applicants. Deadline is March 15.

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director (RD).

[ ]  Attend all house corporation meetings with the vice president: finance and the director of house management.

## vice president: social standards

[ ]  Review the previous terms *End-of-Term Summary Sanction Log* and identify areas for improvement on which Honor Board can focus this term.

[ ]  Review the *Recommended Practices for Managing Individual Emotional/Mental Health Concerns* with the incoming Honor Board.

[ ]  Review the CDC Visit Report from the previous term, if applicable, and identify areas for improvement on which Honor Board can focus this term.

[ ]  Ensure a thorough transition with the outgoing vp: social standards; review all pertinent handbooks and resources; download all pertinent Honor Board-related forms from the Delta Gamma library; review previously-recorded Honor Board webinars in the GIN system; and, contact your Honor Board adviser or Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) with outstanding questions.

[ ]  Plan a goal-setting session at the first Honor Board meeting of the term.

[ ]  Reach out to the Alcohol Skills Training Program (ASTP) Facilitator to coordinate her visit, if applicable (once every 3 years). This should be done at least a month before her arrival.

[ ]  Plan for a CDC visit, if applicable,

[ ]  Complete upcoming awards applications, if applicable.

[ ]  Submit *Honor Board Weekly Meeting Minutes* and *Weekly Summary Sanction Log* to RCS/CAC/NCC on a weekly basis.

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with chapter management team (CMT) and brainstorm positive programming ideas for Honor Board to address trends.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

## vice president: finance

[ ]  ***New Officers:*** Change names and signatures on all bank accounts during transition. Change passwords and login information for online banking and make sure all signers on the account have the new information.

[ ]  Update member information and member status in greekbill to account for member status changes during the break and confirm the roster in Anchorbase corresponds to the greekbill roster.

[ ]  ***New Members:*** New member information will be synced to greekbill from Anchorbase. Once NMs have signed their Statement of Obligation, create charges for those who signed.

[ ]  ***New Members:*** Monitor greekbill to assure all NMs have signed Dues & Fees contracts within 10 days.

[ ]  ***New Members:*** Attend Week 2 of the New Member Pursuit and present fiscal overview per the New Member Pursuit Facilitator’s Guide of Delta Gamma operations and financial obligations to new members.

[ ]  ***Budget:*** Begin conversations with membership concerning member statuses for coming fiscal year (i.e., who will graduate, go abroad, take time off, etc.) for budget purposes. This is the start of the member analysis for budgeting.

[ ]  ***Live-In Housed Chapters:*** Ensure director of house management holds a special meeting with members or new members moving into the house for the first time. Explain the operation of the house and the house resident rules (or during the first month of the term).

[ ]  ***Housed Chapters:*** Ensure director of house management posts house rules in each room or issues a copy for each member's notebook (or during the first month of the term).

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit member account adjustment (MAA) requests for billing group changes or to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees contracts. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive **before the 10th of the month**.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vice president: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at Executive Offices (EO).

[ ]  ***On the 11th***, ensure Automatic Probation Notifications (APNs) are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a *Statement of Obligation Review (SOR)*.)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with HB to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file SORs for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month.

[ ]  Submit Bad Debt Write-Offs for any alumnae/non-member with debt of less than $750 or start collections process for secured amounts over $750. Alumnae will be placed on the list for Council to review for expulsion. Check with chapter operations adviser (COA), Regional Finance Specialist (RFS)/New Chapter Finance Coordinator (NCFC) and your Executive Offices collegiate finance consultant (CFC) to confirm before moving forward.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members and alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with chapter management team (CMT).

[ ]  Attend all house corporation board meetings along with the chapter president director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

## vice president: communications

[ ]  Upload chapter meeting minutes in Anchorbase for the Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC).

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Update member information and review chapter roster in Anchorbase. If there are any roster changes that need to be made, please complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vice president: finance.

[ ]  Receive all social media, website and email account passwords from outgoing officer.

## vice president: programming

Spring Reminders:

[ ]  If not approved prior, present the Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC)-approved calendar to the chapter for their approval. The vote to approve the calendar should occur the first business meeting following RCS/CAC/NCC approval. No additional anchored (required) events may be scheduled without RCS/CAC/NCC approval (if not completed during the fall term).

[ ]  Prepare for the *Adviser Recognition or Appreciation* for the spring term, if holding in spring. This can be held in conjunction with Founders Day.

[ ]  Ensure director of alumnae relations plans for and holds a collumnae event, if holding in spring.

[ ]  Check in with director of alumnae relations to ensure she is working with the local alumnae group to attend/plan a Founders Day celebration on or near March 15. If your chapter does not have a director of alumnae relations, appoint a Founders Day chairman and/or member to work with local alumnae group to plan Founders Day celebration on or near March 15.

[ ]  Plan for and hold the *Senior Recommitment Ceremony* for members graduating this term

[ ]  Plan for and hold *Article II Chapter Goal Setting* starting with Step 2 if not completed in the fall (also known as Article II Assessment).

[ ]  Plan for the Alcohol Skills Training Program (ASTP) visit once every three years; contact Executive Offices if you are unsure when your chapter will next receive it and if you should schedule it for the upcoming fall term.

Monthly Tasks:

[ ]  Distribute current term’s *Master Calendar* to members and advisers.

[ ]  Introduce GreekLifeEdu program and its requirements to new members during Week 2 of the new member period. Ensure each new member passes part one of the GreekLifeEdu test with a score of 75 percent by Initiation Authorization deadline.

[ ]  Begin planning the *Master Calendar* with chapter management team (CMT) for the next term. Due April 1 for spring quarter (or the date specified by the RCS/CAC/NCC).

[ ]  Review calendar to prepare for scheduled events this month and notify the chapter of any changes.

[ ]  Ensure all officers complete Post-Event Summaries for their events on the calendar, if applicable.

## vice president: member education

[ ]  Ensure the director of new members completes the New Member Entry in Anchorbase by its due date.

[ ]  Work with the director of new members and appropriate advisers to facilitate Big Sister training during Week 4, plan and assign big/little sisters and Big/Little Reveal during Week 5 of the New Member Pursuit.

[ ]  Distribute *Parent Welcome Letter* to all new members. This is emailed to vps: member education by Executive Offices (EO).

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/member education adviser approval. **Due by designated deadline.**

[ ]  Ensure the Candidates List is completed in Anchorbase. **Due by the Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification in Anchorbase the day after Initiation.

[ ]  Conduct Week 9 of the New Member Pursuit, including the Initiation Review, at the first formal meeting following Initiation and assist new members in ordering badges from the official Fraternity jeweler.

[ ]  Implement programming for member education.

[ ]  Ensure the director of scholarship: 1) updates the University Rankings/Statistics and 2) completes the Submit Grades Task for fall term in Anchorbase. These tasks do NOT appear on the Anchorbase Task List and may only be accessed by looking on the due date on the calendar. Due by February 15.

[ ]  Evaluate chapter performance and make necessary revisions to Scholarship Enrichment Program.

[ ]  Ensure the director of rituals reviews responsibilities for Initiation found in the *Collegiate Chapter Officers Manual (CCOM),* and practices the *Initiation Ceremony* with the president, vice president: programming and vice president: communications.

[ ]  Plan necessary formal and informal rituals of new members with the director of rituals.

[ ]  Check ritual equipment and supplies. Contact house corporation to order or replace equipment. Send any ritual curtains that are replaced to the archivist at Executive Offices to ensure proper disposal.

[ ]  Ensure the director of rituals completes the Inspiration and Initiation Outline in Anchorbase for the RCS/CAC/NCC to approve six weeks prior to Initiation date.

[ ]  Download and copy the *New Member Pursuit Notebook* for each new member (for deferred or COB recruitments).

## vice president: membership

**Deferred Recruitment Chapters:**

**Before Recruitment**

[ ]  When legacy Recommendation Forms are received, send thank you notes to acknowledging you received the form.

[ ]  Send thank you notes/emails to alumnae who submit Recommendation Forms as soon as forms are received. See the Delta Gamma library for example notes.

[ ]  Evaluating Committee (EVC) meets to evaluate all *Recommendation Forms*.

[ ]  Set up recruitment management program (MyVote) and enter appropriate sponsorship information.

[ ]  Finalize plans for and implement *Recruitment Preparation Workshop – Prep Week*.

[ ]  Finalize all plans for recruitment.

**During Recruitment**

[ ]  Lead chapter recruitment. Ensure you and other members of EVC meet legacies and other potential new members (PNMs).

[ ]  Contact RCRS/CRC/NCRC if the chapter wants to file a recruitment infraction or if a recruitment infraction has been filed against the chapter.

**After Recruitment**

[ ]  Immediately contact RCRS/CRC/NCRC with results.

[ ]  Complete Primary Recruitment Evaluation within 10 days of Bid Day in Anchorbase.

[ ]  For PNMs who pledged Delta Gamma – alphabetize and give *Recommendation Forms* to the vp: member education for Anchorbase upload.

[ ]  For PNMs pledged to another group – destroy *Recommendation Forms*.

[ ]  For potential COB candidates – file *Recommendation Forms* alphabetically for future use, but destroy all unused forms at the end of the school year.

[ ]  Destroy (do not recycle un-shredded paper) voting sheets, confidential notes from EVC meetings and any other confidential paperwork.

[ ]  **Delete** any confidential electronic documents; this includes any shared documents in tools such as Google Drive.

[ ]  Contact RCRS/CRC/NCRC before filing recruitment infractions; contact her immediately if a recruitment infraction is filed on Delta Gamma.

[ ]  Evaluate recruitment effort with new members, members, recruitment counselors, advisers and EVC.

[ ]  Complete all recruitment Post-Event Summaries in Anchorbase.

**Fall Primary Recruitment Chapters:**

[ ]  Review previous recruitment evaluations.

[ ]  Begin preparation for *RPW #2 - Recruitment Fundamentals*.

[ ]  Update chapter website with dates and mailing addresses – as soon as dates for primary recruitment are known.

[ ]  Update Anchorbase calendar to ensure recruitment dates are accurate – as soon as dates for primary recruitment are known.

**COB:**

[ ]  Review and implement COB Action Plan.

[ ]  Immediately following COB, complete COB/Informal Recruitment Report in Anchorbase (Note: you must have COB Bid Day entered on your chapter Anchorbase calendar.)

[ ]  Contact RCRS/CRC/NCRC with COB results.

**All Chapters:**

[ ]  Begin review of recruitment section of chapter BLSRs.

[ ]  Complete the COB/Total Statistics Report in Anchorbase

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Report and submit to your collegiate development specialist (CDS) at Executive Offices (EO).

## vice president: Panhellenic

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to chapter management team (CMT) and chapter, as appropriate.

[ ]  Immediately notify your Regional Collegiate Recruitment Specialist (RCRS)/Collegiate Recruitment Consultant (CRC)/New Chapter Recruitment Coordinator (NCRC) and PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

## vice president: Foundation

[ ]  Check the Anchorbase calendar to ensure all Signature and Non-Signature Foundation fundraisers are scheduled on the calendar for the semester/term so all required forms are populated on Anchorbase.

[ ]  January is Glaucoma Awareness Month.

[ ]  Celebrate Louis Braille’s birthday on January 4.

[ ]  Ensure that members are aware of the Collegiate Giving Society: Special Foundation recognition for members who complete eight or more Do Good: Service for Sight Hours or make an individual gift of any size to the Foundation in an academic year.

[ ]  Remind members about the merit-based undergraduate scholarships deadline of March 1.

[ ]  Nominate for Convention awards (even years only). Visit <http://www.deltagamma.org/foundation/applications> for nomination links:

*[ ]* Outstanding Faculty Award – Closes February 15

*[ ]* Theta Chapter of Delta Gamma Collegiate Leadership Award Honoring Patricia Peterson Danielson – Closes February 15

**Deferred Recruitment Chapters:**

[ ]  Present and indicate on chapter calendar, during Recruitment Prep Week, Foundation Education for Recruitment: Let’s Talk Philanthropy. After the presentation, complete the task in Anchorbase labeled *Foundation Education for Recruitment: Let’s Talk Philanthropy Summary.*

[ ]  Assist with facilitating Week 4 of the New Member Pursuit, The Ruth Billow Story, to educate new members about our Foundation.

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# February

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *CMT Planning Tool* with CMT.

[ ]  Continue review of chapter Bylaws and Standing Rules with all chapter officers, using current model. Send to RCS/CAC/NCC for approval.

[ ]  Ensure all Initiation Authorization tasks are completed, if applicable, in order to receive authorization from Executive Offices.

[ ]  Begin promoting and identifying Delta Gamma Lewis Institute applicants. Applications due March 15.

[ ]  Attend house corporation board meeting during which the House Corporation Budget and Annual Agreement are voted.

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director.

[ ]  Attend all house corporation meetings with the vp: finance and the director of house management.

## vice president: social standards

[ ]  Submit Honor Board *Weekly Meeting Minutes* and *Weekly Summary Sanction Log* to RCS/CAC/NCC on a weekly basis.

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas for Honor Board to address trends.

[ ]  Plan for a CDC visit, if applicable.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

[ ]  Complete upcoming awards applications, if applicable.

## vice president: finance

[ ]  ***New Members:*** New member information will be synced to greekbill from Anchorbase. Once NMs have signed their Statement of Obligation, create charges for those who signed.

[ ]  ***New Members:*** Monitor greekbill to assure all NMs have signed Dues & Fees contracts within 10 days.

[ ]  ***New Members:*** Attend Week 2 of the New Member Pursuit and per the New Member Pursuit Facilitator’s Guide present fiscal overview of Delta Gamma operations and financial obligations to new members.

[ ]  ***Initiation:*** For chapters with Deferred Recruitment or COB, complete finance part of the Initiation Authorization checklist to affirm all required fees have been properly collected.

[ ]  ***Initiation:*** Within 30 days following Initiation, vp: finance will receive an invoice for the full payment of the house corporation fee for chapters with deferred primary recruitment, the balance or 2nd payment will be due before the end of the school year.

[ ]  ***Budget:*** Participate in conversations about the proposed house corporation budget for the following year and know what impact these figures will have on the collegiate budget. Educate other chapter officers on the impact before the house corporation board votes on their budget.

[ ]  ***Budget:*** Begin budget creation for the next fiscal year as soon as the chapter's Annual Agreement with their house corporation is known. Pull the Budget Report on greekbill and share with officers/directors for input regarding needs in coming fiscal year. Engage in conversation with officers to secure their budget requests for the following year.

[ ]  ***Anchor Games:*** Complete the Fundraising Finance Report Form – Collegiate, on Anchorbase, along with the vp: Foundation no more than two weeks after the fundraising event was held. Print and send the form, along with all checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221.

[ ]  ***Anchor Games:*** Confirm the #332/Anchor Games account has a zero balance within 14 days of the event.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit MAA requests for billing group changes or to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees contracts. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive **before the 10th of the month**.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at EO.

[ ]  ***On the 11th***, ensure APNs are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a *Statement of Obligation Review (SOR)*.)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with Honor Board to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file a SOR for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month.

[ ]  Submit Bad Debt Write-Offs for any alumnae/non-member with debt of less than $750 or start collections process for secured amounts over $750. Alumnae will be placed on the list for Council to review for expulsion. Check with COA, RFS/NCFC and CFC to confirm before moving forward.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members and alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with CMT.

[ ]  Attend all house corporation board meetings along with the chapter president director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

## vice president: communications

[ ]  Upload chapter meeting minutes in Anchorbase for the RCS/CAC/NCC.

[ ]  Give a brief review of winter issue of the *ANCHORA* in chapter and new member meetings.

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Update member information and review chapter roster in Anchorbase. If there are any roster changes that need to be made, please complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: finance.

## vice president: programming

[ ]  Check in with director of alumnae relations to ensure she is working with the local alumnae group to attend/plan a Founders Day celebration on or near March 15. If your chapter does not have a director of alumnae relations, appoint a Founders Day chairman and/or member to work with local alumnae group to plan Founders Day celebration on or near March 15.

[ ]  For quarter schools, submit *Master Calendar* via Anchorbase for RCS/CAC/NCC for approval by April 1 for spring quarter (or the date specified by RCS/CAC/NCC).

[ ]  Begin planning the *Master Calendar* with CMT for the next term. Due April 1 for fall term (or the date specified by the RCS/CAC/NCC).

[ ]  Review calendar to prepare for scheduled events this month and notify the chapter of any changes.

[ ]  If not completed prior, introduce GreekLifeEdu program and its requirements to new members during Week 2 of the new member period. Ensure each new member passes part 1 of the GreekLifeEdu test with a score of 75 percent by Initiation Authorization deadline.

[ ]  Ensure all officers complete Post Event Summaries for their events on the calendar, if applicable.

## vice president: member education

[ ]  Continue to implement membership education as appropriate.

[ ]  Ensure the director of new members complete the New Member Entry in Anchorbase by its due date.

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/member education adviser approval. **Due by designated deadline.**

[ ]  Ensure the Candidates List is completed in Anchorbase. **Due by the Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification in Anchorbase the day after Initiation.

[ ]  Ensure the director of rituals completes the Inspiration and Initiation Outline in Anchorbase for the RCS/CAC/NCC to approve six weeks prior to Initiation.

[ ]  Ensure the director of rituals continues the planned formal and informal rituals for new member.

[ ]  Ensure the director of rituals reviews responsibilities for Initiation found in the *CCOM* and practices the *Initiation Ceremony* with the president, vice president: programming and vice president: communications.

[ ]  Conduct scheduled member education activities.

## vice president: membership

**Deferred Recruitment Chapters:**

**Before Recruitment**

[ ]  When legacy Recommendation Forms are received, send thank you notes acknowledging you received the form.

[ ]  Send thank you notes/emails to alumnae who submit Recommendation Forms as soon as forms are received. See the Delta Gamma library for example notes.

[ ]  EVC meets to evaluate all Recommendation Forms based on the five points of the Membership Star.

[ ]  Set up recruitment management program (MyVote) and enter appropriate sponsorship information.

[ ]  Finalize plans for and implement *RPW – Prep Week* (note: this may have happened in January depending on your calendar and recruitment dates).

[ ]  Finalize all plans for recruitment.

**During Recruitment**

[ ]  Lead chapter recruitment. Ensure you and other members of EVC meet legacies and other PNMs.

[ ]  Contact RCRS/CRC/NCRC to request permission if chapter wishes to release a legacy, prior to making the release.

[ ]  Contact RCRS/CRC/NCRC if the chapter wants to file a recruitment infraction or if a recruitment infraction has been filed against the chapter.

**After Recruitment**

[ ]  Immediately contact RCRS/CRC/NCRC with results.

[ ]  Complete Primary Recruitment Evaluation within 10 days of Bid Day in Anchorbase.

[ ]  For PNMs who pledged Delta Gamma – alphabetize and give *Recommendation Forms* to the vp: member education for Anchorbase upload.

[ ]  For PNMs pledged to another group – destroy *Recommendation Forms*.

[ ]  For potential COB candidates – file *Recommendation Forms* alphabetically for future use, but destroy all unused forms at the end of the school year.

[ ]  Destroy (do not recycle un-shredded paper) voting sheets, confidential notes from EVC meetings and any other confidential paperwork.

[ ]  **Delete** any confidential electronic documents; this includes any shared documents in tools such as Google Drive.

[ ]  Contact RCRS/CRC/NCRC before filing recruitment infractions; contact her immediately if a recruitment infraction is filed on Delta Gamma.

[ ]  Evaluate recruitment effort with new members, members, recruitment counselors, advisers and EVC.

[ ]  Complete all recruitment Post-Event Summaries.

**Fall Primary Recruitment Chapters:**

[ ]  Plan for Primary Recruitment and appoint all committees, assistants and event chairs.

[ ]  Meet with Fraternity/Sorority Advisor (FSA) to get feedback on chapter’s recruitment effort. (See *Recruitment Confidential* pgs. 32 & 46.)

[ ]  Finalize plans and conduct *RPW #2 - Recruitment Fundamentals*, if you have not done so already.

[ ]  Update chapter website with dates and mailing addresses – as soon as dates for primary recruitment are known.

[ ]  Update Anchorbase calendar to ensure recruitment dates are accurate – as soon as dates for primary recruitment are known.

[ ]  Submit updated primary recruitment information to the Delta Gamma website by April 1. Ensure that a chapter specific email address is provided to ensure receiving Recommendation Forms prior to/during primary recruitment.

**COB:**

[ ]  Contact RCRS/CRC/NCRC if eligible for COB.

[ ]  Review and implement COB Action Plan.

[ ]  Immediately following COB, complete COB/Informal Recruitment Report in Anchorbase (Note: you must have COB Bid Day entered on your chapter Anchorbase calendar.)

[ ]  Contact RCRS/CRC/NCRC with COB results.

**All Chapters:**

[ ]  Propose revisions to recruitment sections of the BLSRs.

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Report and submit to your CDS at EO.

## vice president: Panhellenic

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to CMT and chapter, as appropriate.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

## vice president: Foundation

[ ]  Complete Log Do Good Hours task in Anchorbase on February 15 for a progress report and upload the tracking spreadsheet.

[ ]  Nominate for Convention awards (even years only). Visit <http://www.deltagamma.org/foundation/applications> for nomination links:

*[ ]* Outstanding Faculty Award – Closes February 15

*[ ]* Theta Chapter of Delta Gamma Collegiate Leadership Award Honoring Patricia Peterson Danielson – Closes February 15

[ ]  Publicize the availability and qualifications for merit-based scholarships and Sisters Helping Sisters: Need-Based Scholarships. Applications are received online through the SmarterSelect website and are accepted and reviewed on a rolling basis. Application information can be viewed at <http://www.deltagamma.org/foundation/applications>. Remind members that merit-based applications close on March 1 and Sisters Helping Sisters applications close on April 1.

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# March

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *CMT Planning Tool* with CMT.

[ ]  Continue review of chapter Bylaws and Standing Rules with all chapter officers, using current model. Send to RCS/CAC/NCC for approval.

[ ]  After RCS/CAC/NCC approval, review changes in Bylaws and Standing Rules with chapter. After chapter vote to approve, post on Anchorbase.

[ ]  Receive Initiation Authorization from EO before Initiation may be held.

[ ]  Ensure all Initiation Authorization tasks are completed, if applicable, in order to receive authorization from Executive Offices.

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director.

[ ]  Attend all house corporation meetings with the vp: finance and the director of house management.

## vice president: social standards

[ ]  Submit *Honor Board Weekly Meeting Minutes* and *Weekly Summary Sanction Log* to RCS/CAC/NCC on a weekly basis.

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas for Honor Board to address trends.

[ ]  Plan for a CDC visit, if applicable.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

[ ]  Complete upcoming awards applications, if applicable.

## vice president: finance

[ ]  ***Budget:*** Sign the Annual Agreement with house corporation after the HC budget is approved and prior to April 1. Know what impact these figures will have on the collegiate budget for the following year and use these figures in the budgeting process.

[ ]  ***Budget:*** Review financial section of the BLSR for the new fiscal year with CMT. Make sure ensure any additions or modifications are in accordance with Room Agreement/Dues & Fees/Officer Contract language.

[ ]  ***Budget:*** Begin budget creation for the coming fiscal year using the budget Excel workbook, procedure memo, Fixed Expense sheet (all from collegiate finance at EO) and the Annual Agreement (from FHC/FMC). Pull the Profit/Loss vs. Budget Report on greekbill and share with officers/directors for their input regarding needs in coming fiscal year. Hold a conversation with officers to secure their budget requests for the following year. Make sure house is fully occupied for next year; if not, work with RFS/NCFC on how to charge out-of-house members for rent.

[ ]  ***Anchor Games:*** Complete the Fundraising Finance Report Form – Collegiate, on Anchorbase, along with the vp: Foundation no more than two weeks after the fundraising event was held. Print and send the form, along with all checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221.

[ ]  ***Anchor Games:*** Confirm the #332/Anchor Games account has a zero balance within 14 days of the event.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit MAA requests for billing group changes or to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees contracts. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive **before the 10th of the month**.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at EO.

[ ]  ***On the 11th***, ensure APNs are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a *Statement of Obligation Review (SOR)*.)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with HB to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file a SOR for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month.

[ ]  Submit Bad Debt Write-Offs for any alumnae/non-member with debt of less than $750 or start collections process for secured amounts over $750. Alumnae will be placed on the list for Council to review for expulsion. Check with COA, RFS/NCFC and CFC to confirm before moving forward.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members & alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with CMT.

[ ]  Attend all house corporation board meetings along with the chapter president director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

## vice president: communications

[ ]  Upload chapter meeting minutes in Anchorbase for the RCS/CAC/NCC.

[ ]  E-mail 75-word chapter update and photos (non-compressed) to anchora@deltagamma.org (or mail to EO) by April 15.

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Work with the director of public relations to complete the *Chapter Communications & PR Plan* located in the Delta Gamma library. Upload to Anchorbase by April 15.

[ ]  Update member information and review chapter roster in Anchorbase. If there are any roster changes that need to be made, please complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  QUARTER SCHOOLS ONLY: Submit your winter quarter graduates on Anchorbase by March 31.

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: finance.

## vice president: programming

[ ]  Submit *Master Calendar* via Anchorbase for RCS/CAC/NCC approval by April 1 for fall term (or the date specified by RCS/CAC/NCC).

[ ]  If not completed prior, introduce GreekLifeEdu program and its requirements to new members during Week 2 of the new member period. Ensure each new member passes part one of the GreekLifeEdu test with a score of 75 percent by Initiation Authorization deadline.

[ ]  Review calendar to prepare for scheduled events this month and notify the chapter of any changes.

[ ]  Ensure all officers complete Post Event Summaries for their events on the calendar, if applicable

[ ]  Hold Founders Day. This should occur as close to March 15 as possible. Work with the local alumnae group(s) for an enriching Founders Day experience. If alumnae are involved, this counts as the chapters collumnae event requirement.

## vice president: member education

[ ]  Conduct vote to initiate during Week 5 of New Member Pursuit. *Note: At least three weeks prior to the scheduled Initiation, the names of new members who are in the process of meeting the guidelines established by the New Member Pursuit must be presented for the three-fourths vote of approval from the chapter (refer to Constitution Article V., Section 1. C.5). A chapter member may not vote “no” for a proposed candidate who has followed the guidelines as described in the Delta Gamma Constitution and the New Member Pursuit unless the member has submitted a completed and signed Statement of Obligation Review to the vice-president: social standards and the issue described therein has been addressed in a timely manner by the Honor Board.*

[ ]  Ensure the director of rituals reviews responsibilities for Initiation found in the *CCOM* and practices the Initiation Ceremonywith the president, vice president: member education and vice president: communications.

[ ]  Ensure the director of rituals is continuing necessary formal and informal rituals for new members.

[ ]  Ensure the director of rituals completes the Inspiration and Initiation Outline in Anchorbase for the RCS/CAC/NCC to approve six weeks prior to Initiation date.

[ ]  Ask the director of new members to complete the New Member Entry in Anchorbase by its due date.

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/Member Education adviser approval. **Due by designated deadline.**

[ ]  Make sure the Candidates List is completed in Anchorbase. **Due by the Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification in Anchorbase on the day after Initiation.

[ ]  Conduct Week 9 of the New Member Pursuit, including the Initiation Review, at the first formal meeting following Initiation and assist new members in ordering badges from Herff Jones, the official Fraternity jeweler.

[ ]  Conduct scheduled membership education activities.

## vice president: membership

**Fall Primary Recruitment Chapters:**

[ ]  Plan for Primary Recruitment and appoint all committees, assistants and event chairs (if you have not done so already).

[ ]  Send recruitment information letter to SSC, CSC in your state and any CSC of whom you receive requests or have received *Recommendation Forms* from in the past. Include recruitment dates, legacy information and contact information (name, address, telephone and email) for the director of recruitment records.

[ ]  Submit updated primary recruitment information on Anchorbase by April 1. Ensure that a chapter specific email address is provided to ensure receiving Recommendation Forms prior to/during primary recruitment.

**Deferred Recruitment Chapters:**

[ ]  Plan and conduct *RPW #1 - Recruitment Introduction*, if not done so already.

**COB:**

[ ]  Develop COB Action Plan for fall and submit it in Anchorbase, due April 1.

**All Chapters:**

[ ]  Upload chapter recruitment standing rules and campus Panhellenic Bylaws to Membership and Panhellenic Fact Sheets by April 1.

[ ]  Assist in completing the *Chapter Communications & PR Plan* due April 15.

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Report and submit to your CDS at EO.

## vice president: Panhellenic

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to CMT and chapter, as appropriate.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

## vice president: Foundation

[ ]  Remind members of financial assistance opportunities available through the Foundation and their deadlines:

*[ ]* Merit-based graduate fellowship applications close April 1.

*[ ]* Sisters Helping Sisters: Need-Based Scholarship applications close April 1.

*[ ]* Interest-free student loans are available to members and do not have a deadline. Remember: loans cannot be used for dues!

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# April

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *CMT Planning Tool* with CMT.

[ ]  After RCS/CAC/NCC approval, review changes in Bylaws and Standing Rules with chapter. After chapter vote to approve, post on Anchorbase.

[ ]  Review committee system for the fall term.

[ ]  Ensure all Initiation Authorization tasks are completed, if applicable, in order to receive authorization from Executive Offices.

[ ]  Develop committee structure and membership to be implemented for the fall term.

[ ]  Plan adviser appreciation event for NPC Advisor Appreciation Month.

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director.

[ ]  Attend all house corporation meetings with the vp: finance and the director of house management.

## vice president: social standards

[ ]  Submit the *End-of-Term Summary Sanction Log* to the RCS/CAC/NCC within three (3) days of the last Honor Board meeting of the term.

[ ]  Submit *Honor Board Weekly Meeting Minutes* and *Weekly Summary Sanction Log* to RCS/CAC/NCC on a weekly basis.

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas for Honor Board to address trends.

[ ]  Plan for a CDC visit, if applicable.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

[ ]  Complete upcoming awards applications, if applicable.

## vice president: finance

[ ]  ***Budget:*** Complete the budget for the next fiscal year with the COA on the *Budget Excel Workbook* (found on the Delta Gamma website and sent by collegiate finance) and review it with CMT. Then forward the proposed budget to the RFS/NCFC for approval or revisions needed.

[ ]  ***Budget:*** Once approved by the RFS/NCFC, complete the Budget Template Email document and email to your members, new members, and advisers at least seven (7) days prior to the budget approval vote as listed on your chapter’s Anchorbase calendar. Chapter will vote to approve the budget at a second meeting the following week. Vote must be recorded in chapter meeting minutes and forwarded to RFS/NCFC.

[ ]  ***Anchor Games:*** Complete the Fundraising Finance Report Form – Collegiate, on Anchorbase, along with the vp: Foundation no more than two weeks after the fundraising event was held. Print and send the form, along with all checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221.

[ ]  ***Anchor Games:*** Confirm the #332/Anchor Games account has a zero balance within 14 days of the event.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit MAA requests for billing group changes or to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees contracts. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive **before the 10th of the month**.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at EO.

[ ]  ***On the 11th***, ensure APNs are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a Statement of Obligation Review (SOR).)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with HB to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file a SOR for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month.

[ ]  Submit Bad Debt Write-Offs for any alumnae/non-member with debt of less than $750 or start collections process for secured amounts over $750. Alumnae will be placed on the list for Council to review for expulsion. Check with COA, RFS/NCFC and CFC to confirm before moving forward.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members & alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with CMT.

[ ]  Attend all House Corporation board meetings along with the chapter president director of house management.

[ ] Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

## vice president: communications

[ ]  Upload chapter meeting minutes in Anchorbase for the RCS/CAC/NCC.

[ ]  Encourage graduating seniors to change their addresses/contact information with EO by emailing addresschange@deltagamma.org or by logging into the Delta Gamma website and updating their profiles.

[ ]  Remind members of their responsibility to keep EO informed of name and address changes.

[ ]  Ensure all official correspondence is answered and all communication filed for the year.

[ ]  Upload chapter BLSR to Anchorbase and the other Information Fact Sheet after RCS/CAC/NCC approval and chapter vote.

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Update member information and review chapter roster in Anchorbase. If there are any roster changes that need to be made, please complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: finance.

[ ]  Update *Chapter Communications and PR Plan* to Anchorbase by April 15.

## vice president: programming

[ ]  If not completed prior, introduce GreekLifeEdu program and its requirements to new members during Week 2 of the new member period. Ensure each new member passes part 1 of the GreekLifeEdu test with a score of 75 percent by Initiation Authorization deadline.

[ ]  Present the Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC)-approved calendar to the chapter for their approval. The vote to approve the calendar should occur the first business meeting following RCS/CAC/NCC approval. No additional anchored (required) events may be scheduled without RCS/CAC/NCC approval (if not completed during the fall term).

[ ]  Review calendar to prepare for scheduled events this month and notify the chapter of any changes.

[ ]  Ensure all officers complete Post-Event Summaries for their events on the calendar, if applicable.

## vice president: member education

[ ]  Ensure the director of new members complete the New Member Entry in Anchorbase by its due date.

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/member education adviser approval. **Due by designated deadline.**

[ ]  Make sure the Candidates List is completed in Anchorbase. **Due by the Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification in Anchorbase on the day after Initiation.

[ ]  Conduct Week 9 of the New Member Pursuit, including the Initiation Review, at the first formal meeting following Initiation and assist new members in ordering badges from Herff Jones, the official Fraternity jeweler.

[ ]  Check equipment, supply of Pi Alpha pins and work with vp: finance and house corporation to order replacements as needed and budget allows. Update rituals closet inventory sheet as needed.

[ ]  Continue new member rituals and informal rituals programs.

[ ]  For quarter schools only: Ensure the director of scholarship 1) updates the University Rankings/Statistics and 3) completes the Submit Grades Task for winter term in Anchorbase. These tasks do NOT appear on the Anchorbase Task List and may only be accessed by looking on the due date on the calendar itself. Due by April 15.

[ ]  Ensure the director of rituals completes the Inspiration and Initiation Outline in Anchorbase for the RCS/CAC/NCC approval six weeks prior to Initiation.

[ ]  Conduct scheduled member education activities.

## vice president: membership

**Fall Primary Recruitment Chapters:**

[ ]  Contact RCRS/CRC/NCRC with fall recruitment dates.

[ ]  Upload Membership Selection Criteria Worksheet in Anchorbase (note: these were established during *RPW #2*).

[ ]  Send recruitment information letter to SSC, CSC in your state and any CSC from whom you receive requests or have received *Recommendation Forms* from in the past. Include recruitment dates, legacy information and contact information (name, address, telephone and email) for the director of recruitment records.

[ ]  Update chapter website with dates and mailing addresses – as soon as dates for primary recruitment are known.

[ ]  Update Anchorbase calendar to ensure recruitment dates are accurate – as soon as dates for primary recruitment are known.

**Deferred Recruitment Chapters:**

[ ]  Conduct *RPW #1 - Recruitment Introduction*, if not done so already.

**All Chapters:**

[ ]  Upload chapter recruitment standing rules and campus Panhellenic Bylaws to Membership and Panhellenic Fact sheets by April 1.

[ ]  Assist vp: communications with uploading *Chapter Communications & PR Plan* in Anchorbase by April 15.

[ ]  Submit COB Action Plan in Anchorbase by April 1.

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Report and submit to your CDS at EO.

## vice president: Panhellenic

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to CMT and chapter, as appropriate.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

## vice president: Foundation

[ ]  Celebrate International Guide Dog Day on the last Wednesday in April.

[ ]  Complete Log Do Good Hours task in Anchorbase on April 15 for a progress report and upload the tracking spreadsheet.

[ ]  Apply for the H.K. Stuart Spirit of Service Convention award (even years only). Visit <http://www.deltagamma.org/foundation/applications> for more information and to apply by May 1.

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# May-June

Chapter:

Date Completed and Submitted to ATC:

## president

[ ]  Review *CMT Planning Tool* with CMT.

[ ]  Provide ATC, RCS/CAC/NCC, RFS/NCFC, and RCRS/CRC/NCRC the summer contact information for chapter officers if necessary.

[ ]  Update all Fact Sheets in Anchorbase.

[ ]  Ensure all Initiation Authorization tasks are completed, if applicable, in order to receive authorization from Executive Offices.

[ ]  Submit Tenth of the Month (TOM) Report if required by your Regional Director.

[ ]  Attend all house corporation meetings with the vp: finance and the director of house management.

## vice president: social standards

[ ]  Submit the *End-of-Term Summary Sanction Log* to the RCS/CAC/NCC within three (3) days of the last Honor Board meeting of the term.

[ ]  Submit *Honor Board Weekly Meeting Minutes* and *Weekly Summary Sanction Log* to RCS/CAC/NCC on a weekly basis.

[ ]  Submit compliance packet after each formal hearing to the RCS/CAC/NCC within three days of the hearing.

[ ]  At each weekly Honor Board meeting, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas for Honor Board to address trends.

[ ]  Plan for a CDC visit, if applicable.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events with alcohol, are submitted on Anchorbase at least one week prior to the event.

[ ]  Assist the director of social events to make sure all *Event Guideline* materials, for events without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC approval.

[ ]  Complete upcoming awards applications, if applicable.

## vice president: finance

**This Month (Our Fiscal Year ends on June 30!):**

[ ] ***Budget:*** After RFS/NCFC approval and chapter vote have been taken, upload the approved budget onto greekbill using Budget Builder.

[ ] ***End of Year:*** If the April report shows a yearly surplus and **most** chapter bills are paid **for the year**, the chapter may choose to spend a portion of this surplus (over 5%). Work with your COA & RFS/NCFC to determine how much can be spent. This expenditure proposal is presented to the chapter for a vote and that vote recorded in the minutes. Check(s) must be written and recorded in greekbill **prior to June 30**.

[ ]  ***End of Year:*** Change status of spring graduates or transfers on greekbill to alumnae/non-member and, if $0 balance, take off-system. Contact members with unpaid balances. Contact greekbill to refund credit balances.

[ ]  ***End of Year:*** Submit Bad Debt Write-Offs for any alumnae/non-member with debt of less than $750 ***prior to May 30***. Check with COA, RFS/NCFC and CFC to confirm before moving forward.

[ ]  ***End of Year:*** Confirm all secured past due receivables are paid and start the collection process if the debt is higher than $750. Alumnae will be placed on the list for Council to review for expulsion. Check with COA, RFS/NCFC and CFC to confirm before moving forward.

[ ]  ***End of Year:*** Confirm all funds owed to the Foundation earned at Anchor Games are distributed. The #332 Anchor Games must have a zero balance ***by June 30***.

[ ]  ***End of Year:*** Refund/collect any charges in #360G Reimbursables. The #360G Reimbursables account must have a zero balance ***by June 30***.

[ ]  ***End of Year:*** Confirm the #410 Returned Checks account has a zero balance. CFCs (at EO) can help here.

[ ]  ***End of Year:*** Arrange to have mail forwarded as appropriate. If abroad or unable to act as vp: finance during the summer months, arrange for the chapter president, COA or ATC to make the necessary reports and pay any bills. Note: The director of funds may not fulfill this responsibility as she is not bonded.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by finance account number.

[ ]  Submit MAA requests to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Ensure ACH payments/checks to pay Fraternity and Fraternity Housing Corporation (FHC)/Fraternity Management Corporation (FMC) invoices will arrive **before the 10th of the month**.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: communications.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s collegiate finance consultant at EO.

[ ]  ***On the 11th***, ensure APNs are submitted in greekbill for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month. (Note: New members may not be given APNs, they must be given a *Statement of Obligation Review (SOR)*.)

[ ]  ***At the first Honor Board meeting after the 11th***, meet with Honor Board to review Past Due Receivables, APN/SOR list, members who have received 45-day collection letters and members whose debt is more than 60 days overdue.

[ ]  ***On the 15th***, send 45-day collection letter to any member whose debt is overdue from the previous month.

[ ]  ***On the 30th***, file a SOR for any member who has not paid any bill submitted on greekbill that was due on the 1st of the month.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members and alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Review the Profit/Loss vs. Budget Report on greekbill and share with CMT.

[ ]  Attend all house corporation board meetings along with the chapter president director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.

[ ]  Complete the *Fundraising Finance Report Form – Collegiate* in Anchorbase, with the vp: Foundation, no more than two weeks after the fundraising event was held. Print and send the form, along with checks made payable to the Foundation, to Delta Gamma Foundation, 3250 Riverside Drive, Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses to FoundationFinance@deltagamma.org with your chapter name in the subject line.

**VICE PRESIDENT: COMMUNICATIONS**

[ ]  Upload chapter meeting minutes in Anchorbase for the RCS/CAC/NCC.

[ ]  Encourage graduating seniors to change their address with EO by emailing addresschange@deltagamma.org or by logging into the Delta Gamma website and updating their profile.

[ ]  Remind members of their responsibility to keep EO informed of name and address changes.

[ ]  Upload chapter BLSR to Anchorbase and the other Information Fact Sheet after RCS/CAC/NCC approval and chapter vote if not already completed.

[ ]  Update all Fact Sheets in Anchorbase.

[ ]  Ensure all officers complete Post-Event Summaries in Anchorbase for their events on the calendar.

[ ]  Ensure Anchorbase roster is accurate. Make sure graduation years are correct for graduating seniors.

[ ]  Submit all spring graduates on Anchorbase by May 31.

[ ]  Update member information and review chapter roster in Anchorbase. If there are any roster changes that need to be made, please complete the appropriate roster change task via your chapter’s Anchorbase.

[ ]  Ensure the GIN system is updated and utilized.

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: finance.

## vice president: programming

[ ]  If not approved prior, present the Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC)-approved calendar to the chapter for their approval. The vote to approve the calendar should occur the first business meeting following RCS/CAC/NCC approval. No additional anchored (required) events may be scheduled without RCS/CAC/NCC approval (if not completed during the fall term).

[ ]  Ensure all officers complete Post-Event Summaries for their events on the calendar, if applicable.

## vice president: member education

[ ]  Submit the chapter plans for Bid Day (8 weeks prior to Bid Day) and Big/Little Reveal (6 weeks prior to Big/Little Reveal) for ATC/member education adviser approval. **Due by designated deadline.**

[ ]  Ask the director of new members to complete the New Member Entry in Anchorbase by its due date.

[ ]  Ensure the Candidates List is completed in Anchorbase. **Due by the Initiation Authorization deadline.**

[ ]  Confirm all Statement of Obligation contracts and Dues and Fees contracts have been signed by the Initiation deadline.

[ ]  Complete Initiation Certification in Anchorbase the day after Initiation.

[ ]  Ensure the director of rituals plans informal ritual programs and new member ritual programs.

[ ]  Ensure the director of rituals completes the Inspiration and Initiation Outline in Anchorbase for the RCS/CAC/NCC approval six weeks prior to Initiation date.

[ ]  Ensure the director of rituals reviews responsibilities for Initiation found in the *CCOM* and practices the *Initiation Ceremony* with the president, vice president: member education and vice president: communications.

[ ]  Ensure all officers are completing Anchorbase tasks.

[ ]  Conduct scheduled member education activities.

## vice president: membership

**Fall Primary Recruitment Chapters:**

[ ]  When legacy Recommendation Forms are received, send thank you notes acknowledging you received the form.

[ ]  Send thank you notes/emails to alumnae who submit Recommendation Forms as soon as forms are received. See the Delta Gamma library for example notes.

[ ]  Order all recruitment supplies.

[ ]  Oversee all recruitment preparations, checking in regularly with recruitment committees.

[ ]  Upload Membership Selection Criteria Worksheet in Anchorbase (note – these were established during *RPW #2*).

[ ]  Send recruitment information letter to SSC, CSC in your state and any CSC from whom you receive requests or have received Recommendation Forms from in the past. Include recruitment dates, legacy information and contact information (name, address, telephone and email) for the director of recruitment records.

[ ]  Check with director of recruitment records on responsibilities, such as sending requests for Recommendation Forms and acknowledging those received.

[ ]  Refine plans for *RPW - Prep Week*.

[ ]  Send summer letter to chapter members reminding them of recruitment dates and any other announcements, rules or reminders needed for recruitment.

[ ]  Update chapter website with dates and mailing addresses – as soon as dates for primary recruitment are known.

[ ]  Update Anchorbase calendar to ensure recruitment dates are accurate – as soon as dates for primary recruitment are known.

**COB:**

[ ]  Finalize all plans for fall COB events.

**All Chapters:**

[ ]  If on Report to Director: Collegiate Recruitment Development, complete the On Report to Director: Collegiate Recruitment Development Reports and submit to your CDS at EO.

## vice president: Panhellenic

[ ]  Attend all College Panhellenic Council meetings. Bring trends and discussions to CMT and chapter, as appropriate.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic.

[ ]  Immediately notify your RCRS/CRC/NCRC and PSS of any discussions or meetings pertaining to extension on the campus.

[ ]  Upload campus Panhellenic meeting minutes in Anchorbase.

[ ]  Update Panhellenic Fact Sheet in Anchorbase.

## vice president: Foundation

[ ]  Work with your vp: finance to ensure that all winter/spring term Foundation fundraising dollars have been mailed to EO with a completed FFRF (see below for submission information). Semester schools by May 15. Quarter schools by June 30.

[ ]  Complete Log Do Good Hours task in Anchorbase on the final day of classes for the cumulative report and upload the tracking spreadsheet.

[ ]  Celebrate Helen Keller’s Birthday on June 27.

**Every Month:**

[ ]  Complete the required Anchorbase tasks:

[ ]  *Delta Gamma Event Guideline Form for Events without Alcohol*: 4 weeks before ALL Foundation Fundraising events (this form is not required for virtual or percentage sale fundraisers) and approved by Advisory Team Chairman (ATC). Examples: Anchor Splash, Anchor Slam, Anchor Run, etc.

[ ]  *Pre-Planning Event Form*: 6 weeks prior to the Foundation fundraising event. Email your Regional Foundation Coordinator (RFNC) when you have completed for her required review and approval.

[ ]  *Fundraising Finance Report Form (FFRF*): Work with the vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that the vp: finance prints and mails the Fundraising Finance Report Form, along with all checks made payable to the Foundation and any receipts for reimbursement of expenses, to Delta Gamma Foundation, 3250 Riverside Dr., Columbus, OH 43221. If there are no checks to be mailed, email a PDF copy of the completed FFRF and any receipts for reimbursement of expenses, to FoundationFinance@deltagmma.org.

[ ]  Make sure any additional Foundation fundraisers (for example: food sales, percentage night at restaurants, etc.) have been added to the Anchorbase Calendar so they can populate the required forms for each fundraiser.

[ ]  Track and maintain an accurate record of each member’s Do Good: Service for Sight Hours to be considered for a Top Ten Do Good: Service for Sight Hours Foundation Award (annual award).

# July

Chapter:

Date Completed and Submitted to ATC:

## vice president: finance

[ ]  ***New Year:*** Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other in conjunction with vp: communications.

[ ]  ***New Year:*** ***Between July 1-8***, using the Creating Charges function on greekbill, create and assign Dues & Fees on greekbill for member signatures. Invoice dates for the entire year are included.

[ ]  ***New Year:*** Send e-mail message (by whatever system the chapter uses) to members alerting them they have Dues & Fees contracts to sign by a prescribed date—10 days from the date of notification from greekbill.

[ ]  ***New Year:*** Monitor signatures of assigned Dues & Fees contracts on greekbill, and issue APNs if contracts are not signed within 10 days of issue.

[ ]  ***New Year:*** Ensure the chapter’s current BLSRs are uploaded to greekbill and assign to current chapter membership.

[ ]  ***New Year:*** Set up physical or electronic files for the new fiscal year. Organize old/outdated forms, receipts and bills. You must keep records for seven (7) years. Destroy records over seven (7) years old.

[ ]  Continue to collect receivables and/or submit Bad Debt Write-Offs/start collections process.

**Every week:**

[ ]  Pay all invoices/bills/reimbursements and enter checks and local deposits in greekbill.

[ ]  Maintain finance files (physical or electronic), organized by greekbill account number.

[ ]  Submit MAA requests to remove dues and fees for members whose status has changed.

[ ]  Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees contracts. Follow up with alumnae/non-members on remaining charges or contact greekbill to refund credit balances. Move alumnae/non-members with zero balances off-system.

**Every month:**

[ ]  Confirm Anchorbase and greekbill chapter rosters are correct and correspond with each other.

[ ]  ***On or before the 10th***, review bank statement, confirm all checks and deposits are entered in greekbill, and submit the monthly financial report on greekbill. Send copy of bank statement to the chapter’s Collegiate Finance Consultant at EO.

[ ]  Review greekbill reports:

[ ]  Past Due Receivables (members and alumnae/non-members)

[ ]  Member Summary (alumnae/non-members)

[ ]  Unsecured Receivables

[ ]  #360G Reimbursables and #332 Anchor Games accounts

[ ]  Ensure #360G is $0 or positive, meaning monies have been collected from members prior to items being purchased. This may require following up with members individually.

[ ]  Attend all house corporation board meetings along with the chapter president director of house management.

[ ]  Work with director of house management to assign Room Agreements and ensure the house is full at all times.