



Delta Gamma  
1873

# CMT PLANNING TOOL

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*Updated April 2024*

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# PRESIDENT

## CMT Planning Tool

## January - June

JANUARY	FEBRUARY	MARCH
<p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas for improvement CMT/JCMT can focus on this term.</p> <p>Connect with your regional team to ensure officer introductions are made.</p> <p>Start calendar planning led by vp: programming for spring quarter, if applicable.</p> <p>Complete Bronze and Cable Course Pursuit modules at <a href="https://learning.deltagamma.org">learning.deltagamma.org</a>.</p> <p><b>Deferred Recruiting Chapters:</b> Ensure the vp: finance assigns Room Agreements for the next fiscal year within three weeks of Bid Day.</p>	<p>Develop a committee structure and assign membership to support CMT/JCMT officers based upon applications with the director of committees, if applicable.</p> <p>Begin review of chapter Bylaws and Standing Rules (BLSR) led by vp: communications with all officers, using the model in Delta Gamma library.</p> <p>Collaborate with vp: programming to ensure all spring quarter calendar dates have been submitted in Anchorbase for RCS/CAC/NCC review by <b>March 1</b>, if applicable.</p> <p>Start calendar planning led by vp: programming for fall semester/quarter.</p> <p>Assists the vp: finance and chapter financial adviser (CFA) in preparing the annual budget.</p>	<p>Ensure all tasks are completed to receive Initiation Authorization from EO, if applicable.</p> <p>After RCS/CAC/NCC approval, ensure a chapter review of BLSR changes is conducted by vp: communications and a chapter vote occurs a week later.</p> <p>Collaborate with vp: programming to ensure all fall calendar dates have been submitted accurately in Anchorbase for CDS review by <b>May 1</b>.</p> <p>Work with CMT to select a chapter member to attend Lewis Institute and ensure they're registered by communicated deadline.</p>
APRIL	MAY	JUNE
<p>Develop committee structure to be implemented in the fall term with the director of committees, if applicable.</p> <p>Plan adviser appreciation event for NPC Advisor Appreciation Month.</p> <p>Complete Pink and Cable course Pursuit modules at <a href="https://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Ensure senior initiatives (i.e. Senior Recommitment Ceremony, etc.) are planned by the director of senior programming, if applicable or vp: programming and ensure graduating members are made aware of alumnae chapters/groups.</p> <p>Plan summer chapter communication with CMT/JCMT.</p>	<p>Review chapter roster and collaborate with vp: communications and vp: social standards to ensure accuracy (i.e. removal of graduates, transfers, etc.).</p> <p>Attend summer EVC and/or Honor Board meetings, as scheduled.</p> <p>Ensure summer communication is distributed to the chapter.</p>

# PRESIDENT

CMT Planning Tool

July - December

JULY	AUGUST	SEPTEMBER
<p>Review chapter roster and collaborate with vp: communications and vp: social standards to ensure accuracy (i.e. removal of graduates, transfers, etc.).</p> <p>Attend summer evaluating committee (EVC) and/or Honor Board meetings, as scheduled. Ensure summer communication is distributed to the chapter.</p> <p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas for improvement CMT/JCMT can focus on this term..</p>	<p>Collaborate with necessary officers to ensure the roster reflects active members/new members with accurate emails and graduation dates.</p> <p><b>Fall Primary Recruiting Chapters:</b> Ensure the vp: finance assigns Room Agreements for the next fiscal year within three weeks of Bid Day.</p> <p>Educate members/new members about Delta Gamma policies and procedures regarding alcohol and crisis management, as described in the Crisis Management Quick Reference, Collegiate Alcohol Policy and Medical Amnesty Policy, at first chapter meeting of term in collaboration with vp: social standards.</p>	<p>Implement committee structure and assignments with the director of committees, if applicable.</p> <p>Complete Anchorbase tasks and elections procedures following the Election and Onboarding resources.</p> <p>Ensure all tasks are completed to receive Initiation Authorization from EO, if applicable.</p> <p>Start calendar planning led by vp: programming for spring semester/winter quarter.</p> <p>Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>
OCTOBER	NOVEMBER	DECEMBER
<p>Ensure all tasks are completed to receive Initiation Authorization from EO, if applicable.</p> <p>Complete Anchorbase tasks and elections procedures following the Election and Onboarding resources.</p> <p>Conduct election of officers no later than <b>December 1</b>.</p> <p>Collaborate with vp: programming to ensure all spring semester/winter quarter calendar dates have been submitted accurately in Anchorbase for RCS/CAC/NCC review by <b>November 1</b>.</p> <p>Ensure chapter has completed the Patricia Peterson Danielson Award submission by communicated deadline.</p>	<p><b>Outgoing president:</b> Complete elections procedures following the Election and Onboarding resources. Conduct election of officers no later than <b>December 1</b>.</p> <p><b>Incoming president:</b> Attend transition meetings with directors you will support, if applicable.</p> <p><b>Outgoing president:</b> Coordinate a thorough officer transition meeting(s) with incoming president and local adviser.</p> <p><b>Outgoing president:</b> Add new officers to the Officer Roster in Anchorbase with Officer Installation as their start date.</p> <p><b>Incoming president:</b> Prepare to lead Formal Transition Workshop and ensure officer transition meetings occur.</p>	<p><b>Outgoing president:</b> Lead Officer Installation.</p> <p><b>Outgoing president:</b> Partner with vp: programming to conduct adviser recognition, if held this term. Ensure thank you notes are sent to local advisers and regional team members.</p> <p><b>Outgoing president:</b> Ensure the Officer Roster in Anchorbase reflects new officers <b>(Note: change the president position last to ensure you have access to edit the roster)</b>.</p> <p><b>Incoming president:</b> Collaborate with advisers, regional team and EO staff to conduct robust Formal Transition Workshop.</p> <p><b>Incoming president:</b> Prepare to attend Presidents Academy.</p>

# *CMT Planning Tool* **PRESIDENT**

## **MONTHLY ACTIVITIES**

Review CMT Planning Tool with CMT  
Review chapter roster to ensure accuracy  
Sign vendor contracts with vp: finance after ATC has approved contract  
Communicate with ATC on regular basis  
Check in with CMT and JCMT officers

## **YEAR-ROUND ACTIVITIES**

Any crisis situation should be reported to EO (via [crisis@deltagamma.org](mailto:crisis@deltagamma.org)), your ATC, RCS and RD after contacting necessary emergency responders, if needed.  
Any media requests or statements for approval should be sent to [media@deltagamma.org](mailto:media@deltagamma.org).  
Conduct well-organized and efficient team, committee and chapter meetings using parliamentary procedure.  
Connect with necessary officers to update the Anchorbase roster, as needed.  
Ensure all officers and advisers have appropriate and current handbooks, including the Collegiate Chapter Officers Manual (CCOM).  
Attend all house corporation meetings with the vp: finance and director of house management, if applicable.  
Promote leadership development and educational opportunities throughout the academic year (i.e. scholarships, Lewis Institute, etc.).  
Attend seminars and regional meetings as required.

## **RESOURCES**

[All Policies and Positional Statements](#)  
[CMT Quick Guide: president](#)  
[Collegiate Chapter Officers Manual \(CCOM\)](#)  
[Committee Application](#)  
Elections & Onboarding Resources  
[Fraternity Standards for Collegiate Chapters](#)  
[Honor Board Handbook](#)  
[Recruitment Confidential](#)

# VP: SOCIAL STANDARDS

CMT Planning Tool

January - June

JANUARY	FEBRUARY	MARCH
<p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term..</p> <p><b>Honor Board:</b> Plan goal-setting session at first Honor Board meeting of the term.</p> <p><b>Honor Board:</b> Coordinate recurring Monthly Officer Working Meeting with the necessary officers.</p> <p>Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p><b>Honor Board:</b> Attend week 2 of New Member Pursuit to present an Honor Board Review per the <a href="#">New Member Pursuit Facilitator's Guide</a>, if applicable.</p> <p>Collaborate with directors, if applicable to ensure all spring quarter vp: social standards calendar dates are submitted in Anchorbase by <b>March 1</b>.</p>	<p>Ensure all fall quarter/semester vp: social standards calendar dates are submitted in Anchorbase by <b>April 1</b>.</p>
APRIL	MAY	JUNE
<p>Complete Pink and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p><b>Honor Board:</b> Ensure the Automatic and Standard Procedure Workflows are updated as necessary prior to the end of term.</p> <p>Review chapter roster to ensure accuracy and submit any necessary roster changes (i.e. resignations, approved excused status, etc.).</p>	<p><b>Honor Board:</b> Ensure the Automatic and Standard Procedure Workflows are updated as necessary prior to the end of term.</p> <p>Review chapter roster to ensure accuracy and submit any necessary roster changes (i.e. resignations, approved excused status, etc.).</p>

# VP: SOCIAL STANDARDS

CMT Planning Tool

July - December

JULY	AUGUST	SEPTEMBER
<p>Review chapter roster to ensure accuracy and submit any necessary roster changes (i.e. resignations, approved excused status, etc.). Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p>	<p><b>Honor Board:</b> Plan a goal-setting session at the first Honor Board meeting of the term.  <b>Honor Board:</b> Coordinate recurring Monthly Officer Working Meeting with the necessary officers.</p>	<p><b>Honor Board:</b> Plan a goal-setting session at the first Honor Board meeting of the term.  <b>Honor Board:</b> Coordinate recurring Monthly Officer Working Meeting with the necessary officers.  <b>Honor Board:</b> Attend Week 2 of New Member Pursuit to present an Honor Board Review per the <a href="#">New Member Pursuit Facilitator's Guide</a>, if applicable.  Review risk management plan with CMT to foster successful social events.  <b>Honor Board:</b> Review Housing Live Out Applications and collaborate with vp: finance to ensure the chapter facility is full for the upcoming fiscal year.  Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>
OCTOBER	NOVEMBER	DECEMBER
<p>Ensure chapter has completed the Patricia Peterson Danielson (PPD) Award submission in Anchorbase by communicated deadline.</p>	<p><b>Outgoing vp: social standards:</b> Send the Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) an email to introduce the incoming vp: social standards.  <b>Outgoing vp: social standards:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: social standards and local advisers following the Election and Onboarding resources.  <b>Incoming vp: social standards:</b> Attend transition meetings with directors you will support, if applicable.</p>	<p><b>Outgoing vp: social standards:</b> Ensure a thorough transition with the incoming members of Honor Board.  <b>Outgoing vp: social standards:</b> Send thank-you note to Honor Board adviser (HBA) and RCS/CAC/NCC as part of adviser appreciation.  <b>Incoming vp: social standards:</b> Review all pertinent handbooks and resources and download pertinent Honor Board-related forms. Contact your advisers, regional team, and EO staff with any onboarding needs.  <b>Incoming vp: social standards:</b> Attend Formal Transition Workshop.</p>

# VP: SOCIAL STANDARDS

## MONTHLY ACTIVITIES

Assist the director of social events and/or special events, if applicable to ensure all Event Guidelines material, for events with and without alcohol, are submitted on Anchorbase at least four weeks prior to the event for ATC and EO approval (**Note: EO approval is only needed for events with alcohol**).  
Meet with directors you support to review responsibilities, upcoming deadlines, etc.  
Conduct Monthly Officer Working Meeting with necessary officers to ensure members are being held accountable to BLSR in a timely manner.  
Ensure Honor Board member-at-large is leading monthly retention committee meetings and the committee is collaborating with other officers/teams to enhance the membership experience.

## YEAR-ROUND ACTIVITIES

At weekly Honor Board meetings, assess chapter morale, identify negative and positive trends to share with CMT and brainstorm positive programming ideas.  
Submit Honor Board Meeting Minutes and update the Automatic and Standard Procedure Workflows in Anchorbase, on a weekly basis.  
Submit compliance packet after each formal hearing to RCS/CAC/NCC within three days of hearing.  
Plan for CDC or other guest visits, if applicable.  
Coordinate completion of awards applications, if applicable.  
Attend seminars and regional meetings as required.

## RESOURCES

[All Policies and Positional Statements](#)  
[Anchorbase: How to Update your Roster](#)  
[Anchored Through Adversity: Mental Health Programs and Services](#)  
[CMT Quick Guide: vp: social standards](#)  
[Collegiate Chapter Officers Manual \(CCOM\)](#)  
Elections & Onboarding Resources  
[Fraternity Standards for Collegiate Chapters](#)  
[Guide to Honor Board in Anchorbase](#)  
[Honor Board Handbook](#)  
[Member Status Guide for Chapter Members](#)  
[Social Event Planning Guide](#)



JANUARY	FEBRUARY	MARCH
<p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p> <p><b>Deferred Recruiting Chapters:</b> Ensure Room Agreements are assigned within three weeks of Bid Day to new members who will live in the chapter facility the upcoming fiscal year.</p> <p>Attend Monthly Officer Working Meeting with Honor Board.</p> <p>Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Attend week 2 of the New Member Pursuit to present the chapter budget and financial obligations per the <a href="#">New Member Pursuit Facilitator's Guide</a>, if applicable.</p> <p>Assign charges to new members in greekbill. Monitor greekbill to ensure new members have signed Dues &amp; Fees contracts within 10 days. SORs should be filed for unsigned contracts.</p> <p><b>Initiation:</b> Complete finance section within Manage New Members in Anchorbase to affirm which new members have met financial obligations to be initiated, if applicable.</p> <p><b>Budget:</b> Begin the budgeting process as instructed by Fraternity Director: Collegiate Budgeting or assistant director of collegiate finance with the assistance of CMT, chapter financial adviser (CFA) and regional finance specialist (RFS).</p> <p>Ensure all spring quarter vp: finance calendar dates are submitted in Anchorbase by <b>March 1</b>.</p>	<p>Sign Annual Agreement after the house corporation budget is approved prior to <b>April 1</b>.</p> <p>Review financial section of BLSR for new fiscal year. Ensure additions or modifications are in accordance with Room Agreement/ Dues &amp; Fees/Officer Contract language. Collaborate with CMT and RFS to discuss use of your chapter's accumulated surplus, if applicable.</p> <p><b>Budget:</b> Continue budgeting process as instructed.</p> <p>Ensure all fall quarter/semester vp: finance calendar dates are submitted in Anchorbase by <b>April 1</b>.</p>
APRIL	MAY - JUNE	
<p><b>Budget:</b> After budget draft approval, present provided PowerPoint to the chapter and email out a copy at least seven days prior to the budget approval vote. Chapter will vote to approve the budget at a chapter meeting the following week. After vote has passed, complete the Confirm: Vote to Approve Budget Anchorbase task.</p> <p>Complete Pink and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>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. Work with your CFA &amp; RFS to determine how much can be spent. This expenditure proposal is presented to the chapter for a vote and recorded in the minutes. Check(s) must be written and recorded in greekbill <b>prior to June 30</b>.</p> <p>Contact members/non-members with unpaid balances</p> <p>Confirm all funds owed to the Foundation earned at fundraising events are distributed. The #332 Anchor Games account must have a zero balance by <b>June 30</b>.</p> <p>Refund/collect charges in #360G Reimbursables. The #360G account must be \$0 by <b>June 30</b>.</p> <p>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, CFA or ATC to make the necessary reports and pay any bills. <b>Note: The director of funds may not fulfill this responsibility as they are not bonded.</b></p>	

JULY	AUGUST	SEPTEMBER
<p>Collaborate with vp: social standards and vp: communications to ensure the Anchorbase and greekbill rosters are accurate. Monitor greekbill to ensure all members sign the Dues &amp; Fees contracts within 10 days of it being assigned. APNs should be completed for unsigned contracts. Ensure chapter's approved BLSR are uploaded to greekbill and assigned to chapter members. Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p>	<p><b>Live-In Housed Chapters:</b> Ensure director of house management holds meeting with live in members/new members to explain the operation of the house and resident responsibilities.</p> <p><b>House/Lodge:</b> Ensure director of house management shares facility rules with members/new members that do not live in the facility.</p> <p><b>Fall Recruiting Chapters:</b> Ensure the vp: finance assigns Room Agreements for the next fiscal year within three weeks of Bid Day. Attend Monthly Officer Working Meeting with Honor Board.</p> <p><b>Deferred Recruiting Chapters:</b> Ensure Room Agreements for the next fiscal year are assigned within three weeks of the start of school if initiated members are needed to fill the facility.</p>	<p>Attend week 2 of the New Member Pursuit to present the chapter budget and financial obligations per the <a href="#">New Member Pursuit Facilitator's Guide</a>, if applicable. Assign charges to new members in greekbill. Monitor greekbill to ensure new members have signed Dues &amp; Fees contracts within 10 days. SORs should be completed for new members that do not sign the contract.</p> <p><b>Initiation:</b> Complete finance section within Manage New Members on Anchorbase to affirm which new members have met financial obligations to be initiated, if applicable. Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p> <p><b>Deferred Recruiting Chapters:</b> Ensure Room Agreements for the next fiscal year are assigned within three weeks of the start of school if initiated members are needed to fill the facility.</p>
OCTOBER	NOVEMBER	DECEMBER
<p>Ensure all vp: finance spring semester/winter quarter calendar dates are submitted in Anchorbase for by <b>November 1</b>.</p> <p><b>Initiation:</b> Complete finance section within Manage New Members in Anchorbase to affirm which new members have met financial obligations to be initiated, if applicable</p>	<p><b>Outgoing vp: finance:</b> Assign Officer Contracts in greekbill for newly-elected officers and monitor for signatures.</p> <p><b>Outgoing vp: finance:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: finance and local adviser following the election and onboarding resources.</p> <p><b>Incoming vp: finance:</b> Attend transition meetings with directors you will support, if applicable.</p> <p><b>Outgoing vp: finance:</b> Send the RFS an email to introduce the incoming vp: finance.</p> <p><b>Outgoing vp: finance:</b> Ensure the names on the bank account are changed during onboarding to the new officers.</p>	<p><b>Outgoing vp: finance:</b> Send thank-you note to CFA and RFS as part of adviser appreciation.</p> <p><b>Incoming vp: finance:</b> Assign new officers their roles in greekbill and ensure outgoing officers access is removed after Officer Installation.</p> <p><b>Incoming vp: finance:</b> Change login information for online banking and all signers on account have the new information.</p> <p><b>Incoming vp: finance:</b> Review all pertinent handbooks and resources. Contact your CFA, RFS or EO staff with any onboarding needs.</p> <p><b>Incoming vp: finance:</b> Attend Formal Transition Workshop.</p>

# VP: FINANCE *CMT Planning Tool*

## WEEKLY ACTIVITIES

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

Maintain finance files (physical or electronic), organized by account number. You must keep records for seven years. Destroy records over seven years old.

Submit member account adjustment (MAA) requests for billing group changes or to update dues and fees for members whose status has changed, if needed.

Review completed MAA requests for accuracy. Contact members with billing group changes to sign new Dues & Fees contracts.

## MONTHLY ACTIVITIES

Attend Monthly Officer Working Meeting with Honor Board to review Past Due Receivables, APN/SOR list, member status changes (i.e. EAS, excused status, etc.) and collections.

Collaborate with vp: social standards and vp: communications to ensure the Anchorbase and greekbill rosters are accurate.

On or before the 10th of the month, review bank statements, confirm all checks and deposits are entered in greekbill and submit monthly financial report on greekbill. Upload copy of bank statement to Anchorbase.

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

On the 30th, file SORs for any member who has not paid any bill 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

- Profit/Loss vs. Budget Report (ensure spending is not exceeding budgeted amounts)

## YEAR-ROUND ACTIVITIES

Attend all house corporation board meetings along with the chapter president director of house management, if applicable.

Submit Bad Debt Write-Offs for alumnae/non-member or start collections process as needed. Check with CFA and RFS to confirm before moving forward.

Follow up with alumnae/non-members on debt or issue refunds, as needed.

Work with director of house management to assign Room Agreements and ensure the house is full at all times, if applicable.

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.

Complete the Fundraising Finance Report Form 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](mailto:FoundationFinance@deltagamma.org) with your chapter name in the subject line.

Ensure #332 Anchor Games account has a \$0 balance within 14 days of a fundraising event occurring.

Attend seminars and regional meetings as required

## RESOURCES

[Anchorbase: greekbill Integration Guide](#)

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

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

[Collegiate Finance Handbook](#)

[Elections & Onboarding Resources](#)

[Fraternity Standards for Collegiate Chapters](#)

# VP: COMMUNICATIONS

CMT Planning Tool

January - June

JANUARY	FEBRUARY	MARCH
<p>Begin Bylaws and Standing Rules (BLSR) review using the model in the library. Create a list of changes to discuss with CMT. Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term. Submit quarterly chapter update for the ANCHORA by <b>January 15</b>. Review chapter roster to ensure it only reflects active members and graduation dates are accurate. Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Review Social Media Policy at chapter and new member meeting. After CMT has discussed changes and the applicable year model BLSR document has been completed, submit draft BLSR to RCS/CAC/NCC for approval in Anchorbase no later than six weeks after winter quarter/spring semester began. Ensure all spring quarter vp: communications calendar dates are submitted in Anchorbase by <b>March 1</b>.</p>	<p><b>Quarter Schools:</b> Submit your winter quarter graduates on Anchorbase by <b>March 31</b>. After RCS/CAC/NCC approval, present and send copy of BLSRs changes to chapter. Hold chapter vote one week later. <b>Complete the Confirm:</b> Vote to Approve BLSRs task in Anchorbase following a passing chapter vote.</p>
APRIL	MAY	JUNE
<p>Submit quarterly chapter update for the ANCHORA by <b>April 15</b>. Complete Pink and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Ensure chapter website is up to date, and chapter contact information is correct in the chapter locator on the DG website. Collaborate with EVC on a summer social media presentation that includes review of the Social Media Policy, campus Panhellenic recruitment rules (social media/contact), and best practices. Encourage graduating seniors to update their contact information with EO by emailing <a href="mailto:addresschange@deltagamma.org">addresschange@deltagamma.org</a> or logging into <a href="http://members.deltagamma.org">members.deltagamma.org</a> to update their profiles.</p>	<p>Review chapter roster to ensure accuracy and submit any necessary roster changes (i.e. graduation or updating member information). Collaborate with vp: finance to upload approved BLSR to greekbill as agreement for member accessibility.</p>

# VP: COMMUNICATIONS

CMT Planning Tool

July - December

JULY	AUGUST	SEPTEMBER
<p>Collaborate with directors and EVC to execute recruitment PR plan, if applicable. Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term. Submit quarterly chapter update for the ANCHORA by <b>July 15</b>.</p>	<p>Collaborate with directors and EVC to execute recruitment PR plan, if applicable. Submit quarterly chapter update for the ANCHORA by <b>September 15</b>.</p>	<p>Review Social Media Policy at chapter and new member meeting. Review chapter roster to ensure accuracy and submit any necessary roster changes (i.e. graduation or updating member information). Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>
OCTOBER	NOVEMBER	DECEMBER
<p>Ensure all vp: communications spring semester/winter quarter calendar dates are submitted in Anchorbase for by <b>November 1</b>. Assist director of alumnae relations, if applicable, or vp: programming in creation of a newsletter informing alumnae, members' families and regional officers about chapter activities, events and accomplishments. Contact <a href="mailto:AlumnaeDept@deltagamma.org">AlumnaeDept@deltagamma.org</a> for a list of chapter alumnae email addresses or use member search function at <a href="http://members.deltagamma.org">members.deltagamma.org</a>.</p>	<p><b>Outgoing vp: communications:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: communications and local adviser following the election and onboarding resources.  <b>Incoming vp: communications:</b> Attend transition meetings with directors you will support, if applicable.  <b>Outgoing vp: communications:</b> Share social media, website and email account passwords with incoming vp: communications. Encourage graduating seniors to update their contact information with EO by emailing <a href="mailto:addresschange@deltagamma.org">addresschange@deltagamma.org</a> or logging into <a href="http://members.deltagamma.org">members.deltagamma.org</a> to update their profiles.</p>	<p><b>Incoming vp: communications:</b> Collaborate with directors and EVC to execute recruitment PR plan, if applicable.  <b>Incoming vp: communications:</b> Submit roster changes in Anchorbase for graduating seniors.  <b>Outgoing vp: communications:</b> Send thank-you note to communications adviser or ATC as part of adviser appreciation.  <b>Incoming vp: communications:</b> Review all pertinent handbooks and resources. Contact your advisers, regional team, and EO staff with any onboarding needs.  <b>Incoming vp: communications:</b> Attend Formal Transition Workshop.</p>

## CMT Planning Tool

# VP: COMMUNICATIONS

### MONTHLY ACTIVITIES

Attend Monthly Officer Working Meeting with Honor Board to review attendance trends, absent members/new members, excuses, etc.  
Submit Statement of Obligation Reviews (SORs) via [members.deltagamma.org](https://members.deltagamma.org) for members not meeting membership responsibilities.  
Collaborate with vp: social standards and vp: finance to ensure the Anchorbase and greekbill rosters are accurate. Submit roster changes as needed.  
Meet with the directors you support to review responsibilities, upcoming deadlines, etc.

### YEAR-ROUND ACTIVITIES

Any media requests or statements for approval should be sent to [media@deltagamma.org](mailto:media@deltagamma.org)  
Update member information and review chapter roster in Anchorbase in collaboration with chapter president and vp: social standards.  
Submit quarterly chapter updates for the ANCHORA magazine to this [form](#).  
Ensure director of chapter archives, if applicable, coordinates chapter composites annually.  
Lead recurring committee meetings, if applicable, as outlined in your chapter's committee structure.  
Attend seminars and regional meetings as required.

### RESOURCES

[Anchorbase: How to Update your Roster](#)  
[CMT Quick Guide: vp: communications](#)  
[Collegiate Chapter Officers Manual \(CCOM\)](#)  
[Communications Handbook](#)  
[Elections & Onboarding Resources](#)  
[Fraternity Standards for Collegiate Chapters](#)  
[Guidelines for Taking Effective Minutes](#)  
[Honor Board Handbook](#)  
[Model Bylaws and Standing Rules](#)  
[Social Media Policy](#)

JANUARY	FEBRUARY	MARCH
<p>Ensure spring semester/winter quarter calendar planning has occurred or complete any outstanding tasks with assistance from Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC).</p> <p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p> <p>Collaborate with director of DG Dialogues to prepare small group leaders for term using the Small Group Facilitator Training in the <a href="#">DG Dialogues Program Guide</a>.</p> <p>Collaborate with the director of new members, if applicable, and vp: member education to plan intentional new member sisterhood events and opportunities for members and new members to connect.</p> <p>Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Prepare for the adviser recognition or appreciation, if holding in spring. This can be held in conjunction with Founders Day. Plan for and hold <a href="#">Article II Chapter Goal Setting</a> starting with Step 2 if not completed in the fall (also known as Article II Assessment).</p> <p>Lead spring quarter calendar planning, if applicable. Collaborate with CMT to ensure all spring quarter calendar dates are submitted in Anchorbase for RCS/CAC/NCC review by <b>March 1</b>.</p> <p>Check in with director of alumnae relations or Founders Day chair, if applicable, to ensure they are working with the local alumnae group to attend/plan Founders Day on or near <b>March 15</b>.</p>	<p>Hold Founders Day close to <b>March 15</b>. Work with the local alumnae group(s) for an enriching Founders Day experience. If alumnae are involved, this can serve as your spring collumnae event.</p> <p>After RCS/CAC/NCC approval, conduct chapter review of spring quarter calendar dates. Chapter vote occurs a week later. Complete the Confirm: Vote to Approve Calendar Anchorbase task for spring quarter after a passing chapter vote.</p> <p>Lead fall quarter/semester calendar planning. Collaborate with CMT to ensure all fall quarter/semester calendar dates are submitted in Anchorbase for CDS review by <b>May 1</b>.</p>
APRIL	MAY	JUNE
<p>Distribute chapter approved spring quarter calendar dates to chapter, local advisers, house director, if applicable.</p> <p>After RCS/CAC/NCC approval, conduct chapter review of fall quarter/semester calendar dates. Chapter vote should occur a week later.</p> <p>Complete the Confirm: Vote to Approve Calendar Anchorbase task for fall quarter/semester after a passing chapter vote.</p> <p>Plan intentional senior programming, including the Senior Recommitment Ceremony with the director of alumnae relations, if applicable.</p> <p>Complete Pink and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Conduct senior programming and ensure graduating members are made aware of alumnae chapters/groups.</p> <p>Distribute chapter approved fall quarter/semester calendar dates to chapter, local advisers, and house director, if applicable.</p> <p>Ensure intentional senior programming occurs and graduating members are made aware of alumnae chapters/groups in their area.</p>	<p>Ensure fall quarter/semester calendar planning has occurred or complete any outstanding tasks with assistance from RCS/CAC/NCC.</p>



# VP: PROGRAMMING

CMT Planning Tool

July - December

JULY	AUGUST	SEPTEMBER
<p>Ensure fall quarter/semester calendar planning has occurred or complete any outstanding tasks with assistance from RCS/CAC/NCC.</p> <p>Collaborate with the director of new members and vp: member education to plan intentional new member sisterhood events and opportunities for members and new members to connect.</p> <p>Collaborate with the director of new members, if applicable, and vp: member education to plan intentional new member sisterhood events and opportunities for members and new members to connect.</p> <p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p>	<p>Plan for and hold <a href="#">Article II Chapter Goal Setting</a> starting with Step 2 (also known as Article II Assessment).</p> <p>Collaborate with director of DG Dialogues to prepare small group leaders for term using the Small Group Facilitator Training in the DG Dialogues Program Guide.</p>	<p>Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p> <p>Prepare for adviser recognition or appreciation, if holding in the fall.</p> <p>Ensure director of alumnae relations plans for and holds a collumnae event, if holding in the fall. In the absence of a director, coordinate this event with assistance from members.</p>
OCTOBER	NOVEMBER	DECEMBER
<p>Share Collegiate Development Consultant (CDC) job opportunity with the chapter. Applications are due on date specified by EO.</p> <p>Ensure director of alumnae relations, if applicable, plans and publishes a newsletter informing alumnae, members' families and regional officers about chapter activities, events, and accomplishments. In the absence of a director, collaborate with vp: communications to create newsletter.</p> <p>Lead spring semester/winter quarter calendar planning. Collaborate with CMT to ensure all spring semester/winter quarter calendar dates are submitted in Anchorbase for RCS/CAC/NCC review by <b>November 1</b>.</p> <p>Plan intentional senior programming, including the Senior Recommitment Ceremony with the director of alumnae relations, if applicable</p>	<p><b>Outgoing vp: programming:</b> After RCS/CAC/NCC approval, conduct chapter review of spring semester/winter quarter calendar dates. Chapter vote should occur a week later.</p> <p><b>Outgoing vp: programming:</b> Complete the Confirm: Vote to Approve Calendar Anchorbase task for spring semester/winter quarter after a passing chapter vote.</p> <p><b>Outgoing vp: programming:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: programming and local adviser following the Election and Onboarding resources.</p> <p><b>Incoming vp: programming:</b> Attend transition meetings with directors you will support, if applicable.</p> <p><b>Outgoing vp: programming:</b> Distribute chapter approved spring semester/winter quarter calendar dates to chapter, local advisers, house director, if applicable.</p>	<p><b>Outgoing vp: programming:</b> Conduct senior programming and ensure graduating members are made aware of alumnae chapters/groups.</p> <p><b>Incoming vp: programming:</b> Check in with director of alumnae relations, if applicable, to ensure they connect with the local alumnae group to plan Founders Day on or near <b>March 15</b>. In the absence of a director, appoint a Founders Day chair or work with local alumnae group to plan Founders Day.</p> <p><b>Outgoing vp: programming:</b> Collaborate with CMT to coordinate adviser recognition at a chapter meeting, if held this term. Ensure thank you notes have been sent to all local advisers and regional team members.</p> <p><b>Incoming vp: programming:</b> Review all pertinent handbooks and resources. Contact your advisers, regional team, and EO staff with any onboarding needs.</p> <p><b>Incoming vp: programming:</b> Attend Formal Transition Workshop.</p>



*CMT Planning Tool*

# VP: PROGRAMMING

## MONTHLY ACTIVITIES

Review calendar to prepare for scheduled events each month (i.e. sisterhood events, senior programming, DG Dialogues etc.)  
Ensure Anchorbase calendar is accurate and members and advisers are updated on any changes in a timely manner.  
Complete or oversee completion of Event Guidelines tasks in Anchorbase for sisterhood or other programming events.  
Meet with the directors you support to review responsibilities, upcoming deadlines, etc.

## YEAR-ROUND ACTIVITIES

Collaborate with your health & well-being facilitator to coordinate a program date and educate the chapter on the program they will be attending, if applicable.  
Collaborate with RCS/CAC/NCC on calendar planning for each term.  
Lead recurring committee meetings, if applicable, as outlined in your chapter's committee structure  
Attend seminars and regional meetings as required

## RESOURCES

[Article II Chapter Goal Setting](#)  
[Chapter Retreat Planning Guide](#)  
[CMT Quick Guide: vp: programming](#)  
[Collegiate Chapter Officers Manual \(CCOM\)](#)  
[DG Dialogues Program Guide](#)  
Elections & Onboarding Resources  
[Event Guidelines: Social Event Planning Guide](#)  
[Fraternity Standards for Collegiate Chapters](#)  
[Senior Programming and Recognition](#)  
[2024-25 Calendar Planning Guide](#)

# VP: MEMBER EDUCATION

CMT Planning Tool

January - June

JANUARY	FEBRUARY	MARCH
<p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p> <p>Ensure the director of scholarship completes the Grades Task for fall semester/quarter grades in Anchorbase by <b>February 15</b>.</p> <p>Ensure new members are added to Anchorbase in collaboration with the director of new members, if applicable.</p> <p>Collaborate with the director of rituals to complete the Inspiration &amp; Initiation Outline in Anchorbase six weeks prior to Initiation date, if applicable.</p> <p>Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Collaborate with the director of new members, if applicable to ensure all tasks are completed for EO Initiation Authorization. Ensure Big Sister training and Big/Little Reveal occur as instructed in the <a href="#">New Member Pursuit Facilitators Guide</a>.</p> <p>Collaborate with the director of rituals to complete the Inspiration &amp; Initiation (I&amp;I) Outline in Anchorbase, if applicable.</p> <p>Ensure the director of rituals reviews responsibilities for I&amp;I in the Initiation Ritual Books with the president, vp: member education the vp: programming, and any other speakers.</p> <p>Collaborate with directors, if applicable to ensure all spring quarter vp: member education calendar dates are submitted in Anchorbase by <b>March 1</b>.</p> <p>Ensure the directors of rituals and scholarship collaborate with the director of alumnae relations and/or vp: programming to prepare for Founders Day rituals and scholarship recognition.</p>	<p>Collaborate with directors, if applicable to ensure all fall quarter/semester vp: member education calendar dates are submitted in Anchorbase by <b>April 1</b>.</p> <p>Collaborate with the director of scholarship and scholarship adviser or ATC to ensure the scholarship committee meets to develop goals and review the Chapter Scholarship Enrichment Program. Use the <a href="#">Scholarship Handbook</a> a guide. Scholarship Enrichment Program should be shared with chapter.</p> <p>Ensure the director of scholarship completes the Scholarship Program and Requirements Anchorbase task and Grades Task for winter quarter grades, if applicable by <b>April 15</b>.</p>
APRIL	MAY	JUNE
<p>Complete Pink and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p> <p>Connect with the director of rituals to inventory rituals equipment/supplies. Utilize the <a href="#">Rituals Supplies List</a> to order supplies, if needed.</p> <p>Review Anchorbase and remind officers to complete outstanding Anchorbase tasks, if applicable.</p>	<p>Connect with the director of rituals to inventory rituals equipment/supplies. Utilize the <a href="#">Rituals Supplies List</a> to order supplies, if needed.</p> <p>Review Anchorbase and remind officers to complete outstanding Anchorbase tasks, if applicable.</p>	<p>Collaborate with the director of new members, if applicable, to submit the fall Bid Day Plan task in Anchorbase (due eight weeks prior to Bid Day) for ATC/member education adviser approval.</p> <p>Collaborate with the director of new members, if applicable, to submit the fall Big/Little Reveal Plan task in Anchorbase (due six weeks prior to event) for ATC/member education adviser approval.</p>

# VP: MEMBER EDUCATION

CMT Planning Tool

July - December

JULY	AUGUST	SEPTEMBER
<p>Collaborate with the director of new members, if applicable, to submit the fall Bid Day Plan task in Anchorbase (due eight weeks prior to Bid Day) for ATC/member education adviser approval.</p> <p>Collaborate with the director of new members, if applicable, to submit the fall Big/Little Reveal Plan task in Anchorbase (due six weeks prior to event) for ATC/member education adviser approval.</p> <p>Ensure the director of rituals reviews responsibilities for Pi Alpha in the Pi Alpha Ritual Book with the president, vp: member education the vp: programming and any other speakers,.</p> <p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p>	<p>Complete the <a href="#">Campus Resource Worksheet</a> and review it at the first chapter meeting of the term. Distribute the resource electronically to all members, new members, ATC, RCS/CAC/ NCC and <a href="mailto:colldept@deltagamma.org">colldept@deltagamma.org</a> by <b>October 1</b>.</p> <p>Ensure director of scholarship distributes Chapter Scholarship Enrichment Program with updated campus academic resources.</p> <p>Ensure the director of scholarship completes the Grades Task for spring and summer grades in Anchorbase by <b>October 1</b>.</p> <p>Collaborate with the director of rituals to complete the Inspiration &amp; Initiation (I&amp;I) Outline in Anchorbase if applicable.</p>	<p>Ensure the director of rituals reviews responsibilities for I&amp;I in the Initiation Ritual Book with the president, vp: member education, the vp: programming and any other speakers.</p> <p>Ensure new members are added to Anchorbase in collaboration with the director of new members, if applicable.</p> <p>Collaborate with the director of new members, if applicable to ensure all tasks are completed for EO Initiation Authorization. Ensure Big Sister training and Big/Little Reveal occur as instructed in the <a href="#">New Member Pursuit Facilitators Guide</a>.</p> <p>Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>
OCTOBER	NOVEMBER	DECEMBER
<p>Collaborate with directors, if applicable to ensure all vp: member education spring semester/winter quarter calendar dates are submitted in Anchorbase by <b>November 1</b>.</p>	<p><b>Outgoing vp: member education:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: member education and local adviser following the Election and Onboarding resources.</p> <p><b>Incoming vp: member education:</b> Attend transition meetings with directors you will support, if applicable.</p>	<p><b>Outgoing vp: member education:</b> Send thank-you note to the member education adviser as part of adviser appreciation.</p> <p><b>Incoming vp: member education:</b> Review all pertinent handbooks and resources and contact your advisers, regional team, and EO staff with any onboarding needs.</p> <p><b>Incoming vp: member education:</b> Attend Formal Transition Workshop.</p> <p><b>Incoming vp: member education:</b> Collaborate with the director of new members, if applicable, to submit the spring Bid Day Plan task in Anchorbase (due eight weeks prior to Bid Day) for ATC/member education adviser approval.</p> <p>Collaborate with the director of new members, if applicable, to submit the fall Big/Little Reveal Plan task in Anchorbase (due six weeks prior to event) for ATC/member education adviser approval.</p>

*CMT Planning Tool*

# VP: MEMBER EDUCATION

## MONTHLY ACTIVITIES

Schedule and conduct monthly member education activities during chapter meetings.  
Meet with the directors you support to review responsibilities, upcoming deadlines, etc.  
Serve on the Retention Committee in the absence of a director of new members and/or support officers you oversee that serve on this committee.

## YEAR-ROUND ACTIVITIES

Oversee successful completion of the New Member Pursuit and Initiation Authorization as outlined in the New Member Pursuit Facilitators Guide and Initiation Authorization Guide.  
Ensure all officers are completing Anchorbase tasks  
Collaborate with the director of rituals to plan formal and informal rituals  
Lead recurring committee meetings, if applicable, as outlined in your chapter's committee structure  
Attend Honor Board formal hearings of new members.  
Attend seminars and regional meetings as required

## RESOURCES

[Big/Little Promise Form](#)  
[Campus Resource Worksheet](#)  
[CMT Quick Guide: vp: member education](#)  
[Collegiate Chapter Officers Manual \(CCOM\)](#)  
Elections & Onboarding Resources  
[Fraternity Standards for Collegiate Chapters](#)  
[Initiation Authorization Guide](#)  
[New Member Pursuit Facilitators Guide](#)  
[Rituals Handbook](#)

# VP: MEMBERSHIP: DEFERRED PRIMARY RECRUITMENT

*9-12 Months Before Primary Recruitment*

JANUARY - FEBRUARY	MARCH
<p>Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p> <p>Complete the Reporting Recruitment Panhellenic Total task in Anchorbase (due seven days after total is reset during a term).</p> <p>Collaborate with the director of continuous recruitment, if applicable, to complete the COB Statistics Anchorbase task seven days after COB Bid Day.</p> <p>Remind members and new members to complete the Post-Recruitment Assessment that will be sent to the chapter from EO following recruitment.</p> <p>Collaborate with directors, if applicable to ensure all spring quarter vp: membership calendar dates are submitted in Anchorbase by <b>March 1</b>.</p>	<p>Collaborate with directors, if applicable to ensure all fall quarter/semester vp: membership calendar dates are submitted in Anchorbase by <b>April 1</b>.</p>

## RECRUITMENT TASKS

## EVC MEETING TOPICS

Review most recent recruitment statistics, CDC report, and post recruitment survey results	Develop goals for EVC and for recruitment
Create round chair and committee leader applications	Identify round chair and committee duties
Review COB Action Plan and implement	Discuss RPW 1 - 3 agendas and excuses
Create recruitment excuse form	Review budget and work with vp: finance if changes are needed for next fiscal year

# VP: MEMBERSHIP: DEFERRED PRIMARY RECRUITMENT

## 5-8 Months Before Primary Recruitment

JUNE - JULY	AUGUST
<p>Collaborate with the director of recruitment records to review recommendation forms. If you receive communication from a PNM or alumna, use the <a href="#">Recommendation Form Communication Toolkit for Collegiate Chapters</a> to respond.</p> <p>Collaborate with the director of primary recruitment, if applicable to complete the Upload Prep Week Agenda task in Anchorbase at least 4 weeks prior to start of Prep Week.</p> <p>Complete a pre-recruitment call with your Regional Collegiate Recruitment Specialist (RCRS)/Collegiate Recruitment Consultant (CRC)/New Chapter Recruitment Coordinator (NCRC) 2-4 weeks prior to Prep Week. Complete the Pre-Recruitment Call Task in Anchorbase following the call.</p> <p>Collaborate with the director of continuous recruitment to complete the COB Action Plan task for the fall term at least 4 weeks prior to the first day of classes.</p>	<p>In partnership with vp: Panhellenic, complete the Reporting Recruitment Panhellenic Total task in Anchorbase (due 7 days after total is reset during a term)</p> <p>Review CDC Visit Report, if applicable, and identify areas of focus for term.</p>
SEPTEMBER	
<p>Collaborate with the director of continuous recruitment, if applicable to complete the COB Statistics Anchorbase task 7 days after COB Bid Day.</p> <p>Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	

### RECRUITMENT TASKS

### EVC MEETING TOPICS

Committee Meetings	Round chair and committee assignments
Begin working on primary recruitment presentations	RPW Agendas and Evaluations
Review excuse process and any forms received	COB Action Plan (for fall term)
Begin populating a list of potential new members	Identify communication and responsibilities over the summer
Identify if eligible for COB	Implement COB action plan and review PNM list

# VP: MEMBERSHIP: DEFERRED PRIMARY RECRUITMENT

## 3-4 Months Before Primary Recruitment

OCTOBER	NOVEMBER
<p>Collaborate with directors, if applicable to ensure all vp: membership spring semester/winter quarter calendar dates are submitted in Anchorbase for by <b>November 1</b>.</p>	<p><b>Outgoing vp: membership:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: membership and local adviser following the Election and Onboarding resources.</p> <p><b>Incoming vp: membership:</b> Attend transition meetings with directors you will support, if applicable.</p> <p><b>Outgoing vp: membership:</b> Send the RCRS/CRC/NCRC and PSS an email to introduce the incoming vp: membership.</p>

### RECRUITMENT TASKS

### EVC MEETING TOPICS

<p>Conduct committee meetings: finalize action plans</p>	<p>Rotation Group Strategies &amp; Prep Week Schedule</p>
<p>Recruitment Preparation Workshops (RPWs)</p>	<p>Create PR Plan with vp: communications</p>
<p>Discuss meals for members during recruitment</p>	<p>Review Recommendation Forms in Anchorbase and excuses</p>
<p>Purchase recruitment items &amp; complete reservations</p>	<p>MyVote set-up and Complete Pre-Scoring in MyVote</p>

# VP: MEMBERSHIP: DEFERRED PRIMARY RECRUITMENT

*1-2 Months Before Primary Recruitment*

## DECEMBER

**Outgoing vp: membership:** Ensure a thorough transition with the incoming members of EVC utilizing the EVC Transition Workshop in the DG library.

**Outgoing vp: membership:** Send thank-you note to your RCRS/CRC/NCRC as part of adviser appreciation.

**Incoming vp: membership:** Review all pertinent handbooks and resources and, contact your membership adviser, ATC, or RCRS/CRC/NCRC with outstanding questions.

**Incoming vp: membership:** Attend Formal Transition Workshop. Collaborate with advisers, regional team, and EO staff for any onboarding needs.

**Incoming vp: membership:** Collaborate with vp: Panhellenic to review campus Panhellenic recruitment rules with your chapter prior to recruitment, if applicable.

### RECRUITMENT TASKS

### EVC MEETING TOPICS

Finalize rotation groups/schedule	Prep Week agenda
Finalize recruitment purchases	Captains List
Ensure chapter roster is accurate in Anchorbase and MyVote	COB Action Plan



# VP: MEMBERSHIP: DEFERRED PRIMARY RECRUITMENT

## Final Prep

### DURING RECRUITMENT

Contact RCRS/CRC/NCRC or PSS if the chapter wants to file a recruitment infraction or if a recruitment infraction has been filed against the chapter.  
 Maintain contact with RCRS/CRC/NCRC regarding release figures, invitations and returns. Specifically engage when/if invitations do not match carry figures.  
 Ensure recommendation forms or MyVote sponsorships are obtained for all Preference attendees.

### RECRUITMENT TASKS

### EVC MEETING TOPICS

Host Prep Week	Consider rotation group strength & schedule
Begin matching, if possible	Review EVC Meeting Checklist
Update roster in MyVote	Continue Pre-Scoring if information is available

# VP: MEMBERSHIP: DEFERRED PRIMARY RECRUITMENT

*Wrap up/transition*

## RECRUITMENT TASKS

## EVC MEETING TOPICS

Anchorbase Recruitment Statistics	Review unexcused recruitment absences
Recommendation Forms to vp: member education for Anchorbase submission	Follow up with RCRS/CRC/NCRC on recruitment infractions
Thank you cards for those who submitted Recommendation Forms, alumnae & advisers	Conduct EVC Transition Workshop Part 1 to reflect on recruitment
Prepare for transitions	Discuss post-recruitment survey for members and new members
Destroy all confidential information	Implement COB action plan and review PNM list for the spring semester- two week
Identify if eligible for COB	Prep and host fall RPWs

## CMT Planning Tool

# VP: MEMBERSHIP: DEFERRED PRIMARY RECRUITMENT

MONTHLY ACTIVITIES	YEAR-ROUND ACTIVITIES
<p>Review Anchorbase tasks and calendar events. Conduct monthly EVC meetings utilizing the Primary Recruitment Timelines. Meet with the directors you support to review responsibilities, upcoming deadlines, etc.</p>	<p>Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic or discussions pertaining to recruitment or extension on campus. Lead recurring committee meetings, if applicable, as outlined in the committee structure created by your chapter president and director of committees. Attend seminars and regional meetings as required.</p>

RESOURCES	
<p><a href="#">All MyVote Resources</a> <a href="#">CMT Quick Guide: vp: membership</a> <a href="#">Collegiate Chapter Officers Manual (CCOM)</a> Elections &amp; Onboarding Resources</p>	<p><a href="#">Fraternity Standards for Collegiate Chapters</a> <a href="#">Primary Recruitment Voting Guide</a> <a href="#">Recruitment Confidential</a> <a href="#">Recruitment Preparation Workshop (RPW) Outlines</a></p>

# VP: MEMBERSHIP: FALL PRIMARY RECRUITMENT

## 6-8 Months Before Primary Recruitment

JANUARY - FEBRUARY	MARCH
<p>Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p> <p>Complete the Reporting Recruitment Panhellenic Total task in Anchorbase (due seven days after total is reset during a term)</p> <p>Collaborate with the director of continuous recruitment, if applicable, to complete the COB Statistics Anchorbase task seven days after COB Bid Day.</p> <p>Collaborate with directors, if applicable to ensure all spring quarter vp: membership calendar dates are submitted in Anchorbase by <b>March 1</b>.</p>	<p>Collaborate with directors, if applicable to ensure all fall quarter/ semester vp: membership calendar dates are submitted in Anchorbase by <b>April 1</b>.</p>

### RECRUITMENT TASKS

### EVC MEETING TOPICS

Review COB Action Plan and implement (if necessary)	Review most recent recruitment statistics and post-recruitment survey results. Develop goals for EVC and for recruitment
Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas for improvement CMT/JCMT can focus on this term	Review budget and work with vp: finance on changes for next year
Create recruitment excuse form (for all events)	Discuss RPW 4 agenda and excuses
Create round chair and committee leader applications	Identify round chair and committee duties and expectations
Collaborate with CMT/JCMT to create and implement a recruitment PR plan	Begin to gather video clips. Focus on Article II. <a href="#">Review Video Best Practices</a>

# VP: MEMBERSHIP: FALL PRIMARY RECRUITMENT

*3-4 Months Before Primary Recruitment*

## APRIL - MAY

Complete Pink and Cable course Pursuit modules at [learning.deltagamma.org](http://learning.deltagamma.org).

### RECRUITMENT TASKS

### EVC MEETING TOPICS

Conduct committee meetings	Complete COB Action Plan (for fall term)
Begin working on primary recruitment presentations	Collaborate with vp: Panhellenic to review campus Panhellenic recruitment rules with your chapter prior to recruitment, if applicable
Review excuse process and any forms received	RPW Agenda 5 and 6 and Evaluations
Begin populating a list of potential new members	Identify communication and responsibilities over the summer
If budget allows, begin ordering recruitment materials	Review Panhellenic recruitment rules
If applicable, make reservations for prep week and recruitment	Review voting model and Article II

# VP: MEMBERSHIP: FALL PRIMARY RECRUITMENT

## 1-2 Months Before Primary Recruitment

### JUNE - JULY

Collaborate with the director of recruitment records, if applicable, to review recommendation forms. If you receive communication from a PNM or alumna, please use the Recommendation Form Communication Toolkit to respond. Collaborate with the director of primary recruitment to complete the Upload Prep Week Agenda task in Anchorbase at least four weeks prior to the first day of Prep Week.

Complete a pre-recruitment call with your RCRS/CRC/NCRC two to four weeks prior to Prep Week. Complete the Pre-Recruitment Call Agenda Task in Anchorbase following the call. Collaborate with the director of continuous recruitment to complete the COB Action Plan task for the fall term at least four weeks prior to the first day of classes.

### RECRUITMENT TASKS

### EVC MEETING TOPICS

Follow up with committee leaders	Rotation Group Strategies Prep Week Schedule
Prepare recruitment notebooks/folders	Review Excuses
Discuss meals for members during recruitment	Review Recommendation Forms in Anchorbase and Complete Pre-Scoring in MyVote
Purchase recruitment items	MyVote set-up

# VP: MEMBERSHIP: FALL PRIMARY RECRUITMENT

## Final Prep

DURING RECRUITMENT	AUGUST
<p>Contact RCRS/CRC/NCRC or PSS if the chapter wants to file a recruitment infraction or if a recruitment infraction has been filed against the chapter.</p> <p>Maintain contact with RCRS/CRC/NCRC regarding release figures, invitations, and returns. Specifically engage when/if invitations do not match carry figures.</p> <p>Ensure recommendation forms or MyVote sponsorships are obtained for all Preference attendees.</p>	<p>In partnership with the vp: Panhellenic, complete the Reporting Recruitment Panhellenic Total task in Anchorbase (due seven days after total is reset during a term)</p> <p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas for improvement CMT/JCMT can focus on this term.</p>

## RECRUITMENT TASKS

## EVC MEETING TOPICS

Host Prep Week	Rotation Group Strength and Schedule
Finalize any changes to rotation groups, house tours, decor, etc.	Recommendation Form Management
Begin matching, if possible	Review EVC Meeting Checklist
Update roster in MyVote	Continue Pre-Scoring if information is available

# VP: MEMBERSHIP: FALL PRIMARY RECRUITMENT

## Wrap up/transition

SEPTEMBER	OCTOBER
<p>Distribute Post-Recruitment Assessment: Members and Post-Recruitment Assessment: New Members survey to all chapter members upon receipt from Executive Offices staff. 20% of members and 30% of new members minimum must complete the survey</p> <p>Collaborate with the director of continuous recruitment, if applicable, to complete the COB Statistics Anchorbase task seven days after COB Bid Day.</p> <p>Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Collaborate with directors, if applicable to ensure all vp: membership spring semester/winter quarter calendar dates are submitted in Anchorbase for by November 1.</p>
NOVEMBER	DECEMBER
<p><b>Outgoing vp: membership:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: membership and local adviser following the Election and Onboarding resources.</p> <p><b>Incoming vp: membership:</b> Attend transition meetings with directors you will support, if applicable.</p> <p><b>Outgoing vp: membership:</b> Send RCRS/CRC/NCRC and PSS an email introduction with contact information for the <b>incoming vp: membership.</b></p>	<p><b>Outgoing vp: membership:</b> Ensure a thorough transition with the incoming members of EVC utilizing the <a href="#">EVC Transition Workshop</a> in the library.</p> <p><b>Outgoing vp: membership:</b> Send thank-you note to your RCRS as part of adviser appreciation.</p> <p><b>Incoming vp: membership:</b> Review all pertinent handbooks and resources contact your advisers, regional team, and EO staff with any onboarding needs.</p> <p><b>Incoming vp: membership:</b> Attend Formal Transition Workshop. Collaborate with vp: Panhellenic to review campus Panhellenic recruitment rules with your chapter prior to recruitment, if applicable.</p>

## RECRUITMENT TASKS

## EVC MEETING TOPICS

Review Anchorbase Recruitment Statistics	Review unexcused recruitment absences
Share Recommendation Forms with vp: member education for Initiation Authorization Anchorbase task	Follow up with RCRS/CRC/NCRC on recruitment infractions
Send thank you cards for those who submitted Recommendation Forms, alumnae & advisers	Discuss highs and lows of recruitment
Prepare for transitions	Discuss post-recruitment survey for members and new members
Destroy all confidential information	Implement COB action plan and review PNM list for the spring semester- two week
Identify if eligible for COB	Prep and host fall RPWs



## CMT Planning Tool

# VP: MEMBERSHIP: FALL PRIMARY RECRUITMENT

MONTHLY ACTIVITIES	YEAR-ROUND ACTIVITIES
<p>Review Anchorbase tasks and calendar events. Conduct monthly EVC meetings utilizing the Primary Recruitment Timelines Meet with the directors you support to review responsibilities, upcoming deadlines, etc.</p>	<p>Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic or discussions pertaining to recruitment or extension on campus. Lead recurring committee meetings, if applicable, as outlined in the committee structure created by your chapter president and director of committees. Attend seminars and regional meetings as required</p>

RESOURCES	
<p><a href="#">All MyVote Resources</a> <a href="#">CMT Quick Guide: vp: membership</a> <a href="#">Collegiate Chapter Officers Manual (CCOM)</a> Elections &amp; Onboarding Resources</p>	<p><a href="#">Fraternity Standards for Collegiate Chapters</a> <a href="#">Primary Recruitment Voting Guide</a> <a href="#">Recruitment Confidential</a> <a href="#">Recruitment Preparation Workshop (RPW) Outlines</a></p>

# VP: PANHELLENIC

CMT Planning Tool

January - June

JANUARY	FEBRUARY	MARCH
<p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.            Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.            Work with vp: member education to incorporate Panhellenic awareness and education into spring new member and chapter education programs.</p>	<p>Complete Panhellenic Update in Anchorbase (due four weeks after classes begin).            Inform the new members of the purpose and function of Panhellenic, if applicable.            Encourage the chapter to support functions of all Councils and to plan programs that include other women's fraternal organizations.            Collaborate with directors, if applicable to ensure all spring quarter vp: Panhellenic calendar dates are submitted in Anchorbase by <b>March 1</b>.</p>	<p>Collaborate with directors, if applicable to ensure all fall quarter/semester vp: Panhellenic calendar dates are submitted in Anchorbase by <b>April 1</b>.            Consider planning an event which partners with another sorority/sororities (dinner, service project, educational program).</p>
APRIL	MAY	JUNE
<p>Complete Pink and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Consider planning a fall event which partners with another sorority/sororities (dinner, service project, educational program).</p>	<p>Collaborate with vp: membership to review campus Panhellenic recruitment rules with your chapter prior to recruitment, if applicable.            Work with vp: member education to incorporate Panhellenic awareness and education into fall new member and chapter education programs.</p>

# VP: PANHELLENIC

CMT Planning Tool

July - December

JULY	AUGUST	SEPTEMBER
<p>Collaborate with vp: membership to review campus Panhellenic recruitment rules with your chapter prior to recruitment, if applicable. Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p>	<p>Collaborate with vp: membership to review campus Panhellenic recruitment rules with your chapter prior to recruitment, if applicable.</p>	<p>Complete Panhellenic Update in Anchorbase (due four weeks after classes begin). Inform the new members of the purpose and function of Panhellenic. Encourage the chapter to support functions of all Councils and to plan programs that include other women's fraternal organizations. Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>
OCTOBER	NOVEMBER	DECEMBER
<p>Educate your chapter on College Panhellenic Council positions and encourage members to apply for positions, if applicable/interested. Collaborate with directors, if applicable to ensure all vp: Panhellenic spring semester/ winter quarter calendar dates are submitted in Anchorbase for by <b>November 1</b>.</p>	<p><b>Outgoing vp: panhellenic:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: Panhellenic and local adviser following the Election and Onboarding resources. <b>Incoming vp: panhellenic:</b> Attend transition meetings with directors you will support, if applicable. <b>Outgoing vp: panhellenic:</b> Send the Regional Collegiate Recruitment Specialist (RCRS)/Collegiate Recruitment Consultant (CRC)/New Chapter Recruitment Consultant (NCRC) and Panhellenic Support Specialist (PSS) an email to introduce the incoming vp: Panhellenic.</p>	<p><b>Outgoing vp: panhellenic:</b> Send thank-you note to your Panhellenic adviser and PSS as part of adviser appreciation. <b>Incoming vp: panhellenic:</b> Review all pertinent handbooks and resources and, contact your advisers, regional team, and EO staff with any onboarding needs. <b>Incoming vp: panhellenic:</b> Attend Formal Transition Workshop. <b>Incoming vp: panhellenic:</b> Collaborate with vp: membership to review campus Panhellenic recruitment rules with your chapter prior to recruitment, if applicable.</p>

*CMT Planning Tool*  
**VP: PANHELLENIC**

**MONTHLY ACTIVITIES**

Attend all College Panhellenic Council meetings with alternate Panhellenic delegate, if applicable. Bring trends and discussions to CMT and/or chapter, as appropriate.  
Upload campus Panhellenic meeting minutes and complete Monthly Panhellenic Report in Anchorbase.  
Meet with the directors you support to review responsibilities, upcoming deadlines, etc.

**YEAR-ROUND ACTIVITIES**

Immediately notify your RCRS/CRC/NCRC and PSS of any upcoming votes that will be taken by the College Panhellenic or discussions pertaining to recruitment or extension on campus.  
Lead recurring committee meetings, if applicable, as outlined in your chapter's committee structure.  
Attend seminars and regional meetings as required.

**RESOURCES**

[Anchored in Panhellenic Resource Guide](#)  
[CMT Quick Guide: vp: Panhellenic](#)  
[Collegiate Chapter Officers Manual \(CCOM\)](#)  
Elections & Onboarding Resources  
[Fraternity Standards for Collegiate Chapters](#)  
[NPC Manual of Information \(MOI\)](#)  
[vp: Panhellenic Communications Flow Chart](#)

JANUARY	FEBRUARY	MARCH
<p>Work with vp: communications to promote and celebrate:</p> <ul style="list-style-type: none"> <li>January is Glaucoma Awareness Month.</li> <li>Louis Braille's birthday on <b>January 4</b>.</li> </ul> <p>Schedule a call with your Regional Foundation Coordinator (RFNC) to introduce yourself and align on questions.</p> <p>Check Anchorbase calendar to ensure all Signature and Non-Signature Foundation fundraisers are scheduled for the term so all required forms are populated on Anchorbase.</p> <p><b>Deferred Recruitment Chapters:</b> Present <a href="#">Foundation Education for Recruitment: Let's Talk Philanthropy</a> during recruitment prep week. Then complete the Foundation Education for Recruitment Summary Anchorbase task within two weeks of presentation, if applicable.</p> <p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p> <p>Complete Bronze and Cable Course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>	<p>Assist with facilitating week 4 of the New Member Pursuit, The Ruth Billow Story, to educate new members about our philanthropy and Foundation.</p> <p>Complete Log Do Good Hours Anchorbase task by <b>February 15</b> and upload the tracking spreadsheet.</p> <p>Collaborate with directors, if applicable to ensure all spring quarter vp: Foundation calendar dates are submitted in Anchorbase by <b>March 1</b>.</p> <p>Nominate for Theta Chapter of Delta Gamma Collegiate Leadership Award Honoring Patricia Peterson Danielson (Convention years only). Visit <a href="http://deltagamma.org/foundation/applications">deltagamma.org/foundation/applications</a> for nomination links.</p>	<p>Work with vp: communications to promote and celebrate World Glaucoma Week. Visit <a href="#">World Glaucoma Week</a> to find out the specific dates each year.</p> <p>Collaborate with directors, if applicable to ensure all fall quarter/semester vp: Foundation calendar dates are submitted in Anchorbase by <b>April 1</b>.</p> <p>Remind members about Delta Gamma Foundation Merit-Based Undergraduate Scholarships deadline: <b>March 1</b> and Sisters Helping Sisters: Need-Based scholarships applications and Delta Gamma Foundation and Graduate Fellowships close on <b>April 1</b>. Application information can be viewed at <a href="#">here</a>.</p>
APRIL	MAY - JULY	
<p>Work with vp: communications to promote and celebrate:</p> <ul style="list-style-type: none"> <li>April is Women's Eye Health and Safety Month.</li> <li>International Guide Dog Day on the last Wednesday in April.</li> </ul> <p>Complete Log Do Good Hours Anchorbase task by <b>April 15</b>.</p> <p>Complete Pink and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p> <p>Apply for the H.K. Stuart Spirit of Service Convention award (even years only). Click <a href="#">here</a> for more information and to apply by <b>May 1</b>.</p> <p>Submit photos from spring Foundation fundraising events <a href="#">here</a>.</p>	<p>Work with your vp: finance to ensure all winter/spring term Foundation fundraising funds have been mailed to EO with a completed Fundraising Finance Report Form (FFRF). All items are due to the Foundation by <b>June 30</b>.</p> <p>Complete Log Do Good Hours task in Anchorbase on the final day of classes for the cumulative report and upload the tracking spreadsheet.</p> <p>Work with vp: communications to promote and celebrate: Helen Keller's Birthday on <b>June 27</b>.</p>	<p>Present <a href="#">Foundation Education for Recruitment: Let's Talk Philanthropy</a> during recruitment prep week. After the presentation, complete the Foundation Education for Recruitment: Let's Talk Philanthropy Summary Anchorbase task, if applicable.</p> <p>Schedule a call with RFNC to align on academic year plans and answer relevant questions.</p> <p>Check Anchorbase calendar to ensure all Signature and Non-Signature Foundation fundraisers are scheduled for the term so all required forms are populated on Anchorbase.</p>

# VP: FOUNDATION

CMT Planning Tool

July - December

MAY - JULY (CONT.)	AUGUST	SEPTEMBER
<p>Publicize availability and qualifications for Sisters Helping Sisters: view the <a href="#">Need-Based Scholarships Application</a>.</p> <p>Review Fraternity Standards for Collegiate Chapters and most recent CDC Visit Report to identify areas of focus for term.</p>	<p>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.</p> <p><b>Primary Recruiting Chapters:</b> <a href="#">Present Foundation Education for Recruitment: Let's Talk Philanthropy</a> during recruitment prep week. After the presentation, complete the Foundation Education for Recruitment: Let's Talk Philanthropy Summary Anchorbase task within two weeks of presentation, if applicable.</p>	<p>Implement Do Good Hours Tracking Form for new academic year.</p> <p>Assist with facilitating week 4 of the New Member Pursuit, The Ruth Billow Story, to educate new members about our philanthropy and Foundation.</p> <p>Complete Blue and Cable course Pursuit modules at <a href="http://learning.deltagamma.org">learning.deltagamma.org</a>.</p>
OCTOBER	NOVEMBER	DECEMBER
<p>Work with vp: communications to promote and celebrate:</p> <ul style="list-style-type: none"> <li>October is Blindness Awareness Month. Celebrate World Sight Awareness Week.</li> <li>Celebrate World Sight Day on the second Thursday of October.</li> <li>Celebrate White Cane Awareness day on October 15.</li> </ul> <p>Complete Log Do Good Hours Anchorbase task by <b>October 15</b>.</p> <p>Collaborate with directors, if applicable to ensure all vp: Foundation spring semester/winter quarter calendar dates are submitted in Anchorbase for by <b>November 1</b>.</p>	<p>Celebrate Veterans Day/Canadian Remembrance Day on <b>November 11</b> with a Do Good: Service for Sight event serving veterans who have low vision.</p> <p><b>Outgoing vp: Foundation:</b> Coordinate a thorough officer transition meeting(s) with incoming vp: Foundation and local adviser following the Election and Onboarding resources.</p> <p><b>Incoming vp: Foundation:</b> Attend transition meetings with directors you will support, if applicable.</p> <p><b>Outgoing vp: Foundation:</b> Send the RFNC an email to introduce the incoming vp: foundation.</p> <p><b>Outgoing vp: Foundation:</b> 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 (FFRF).</p>	<p><b>Outgoing vp: Foundation:</b> Complete Log Do Good Hours Anchorbase task by <b>December 15</b></p> <p><b>Outgoing vp: Foundation:</b> Provide incoming vp: Foundation the past year's tracking forms and records of Do Good Hours completed by members.</p> <p><b>Outgoing vp: Foundation:</b> Send thank-you note to your RFNC as part of adviser appreciation.</p> <p><b>Incoming vp: Foundation:</b> Review all pertinent handbooks and resources and contact your advisers, regional team, and EO staff with any onboarding needs.</p> <p><b>Incoming vp: Foundation:</b> Attend Formal Transition Workshop.</p>

# CMT Planning Tool

## VP: FOUNDATION

MONTHLY ACTIVITIES	RESOURCES
<p>Meet with the directors you support to review responsibilities, upcoming deadlines, etc.</p> <p>Ensure any additional Foundation fundraisers (ex: food sales, percentage nights, etc.) have been added to the Anchorbase calendar so they populate the required fundraiser forms.</p> <p>Track all Foundation fundraisers and community service events in order to apply for the H.K. Stuart Spirit of Service Award (Convention years only).</p> <p>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).</p>	<p><a href="#">CMT Quick Guide: vp: Foundation</a></p> <p><a href="#">Collegiate Chapter Officers Manual (CCOM)</a></p> <p>Elections &amp; Onboarding Resources</p> <p><a href="#">Foundation Education for Recruitment: Let's Talk Philanthropy</a></p> <p><a href="#">Foundation Focus: Collegiate Edition</a></p> <p><a href="#">Fraternity Standards for Collegiate Chapters</a></p> <p><a href="#">Merit-Based Scholarship Application Instruction Guide</a></p> <p><a href="#">Sisters Helping Sisters: Need-Based Scholarship Application Guide</a></p>
YEAR-ROUND ACTIVITIES	
<p>Complete the required Anchorbase tasks:</p> <p>Foundation Fundraising Planning Form: due 4 weeks prior to the event with ATC and RFNC approval.</p> <p>Fundraising Finance Report Form (FFRF): Work with vp: finance to complete the FFRF no more than 2 weeks after the fundraising event was held. Ensure that vp: finance prints and mails the FFRF, 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 <a href="mailto:FoundationFinance@deltagamma.org">FoundationFinance@deltagamma.org</a>.</p> <p>If your chapter intends to sponsor a one-time Merit-Based Undergraduate Scholarship and/or a Merit-Based</p>	<p>Graduate Fellowships (applications open <b>December 1</b>) to be awarded during the current cycle, send your funds and required paperwork to the Delta Gamma Foundation (3250 Riverside Dr., Columbus, OH 43221) <b>before March 1</b>. Visit the library for more information about funding a merit-based undergraduate scholarship and/or graduate fellowship. Publicize the availability and deadlines of Foundation Individual Member Support opportunities, Merit-Based Undergraduate Scholarships and Graduate Fellowships, Sisters Helping Sisters: Need-Based Scholarships, by directing members to <a href="#">our applications</a>.</p> <p>Lead recurring committee meetings, if applicable, as outlined in the committee structure created by your chapter president and director of committees.</p> <p>Attend seminars and regional meetings as required.</p>