



# Housing Manual





**Delta Gamma housing is, for many sisters, a place where they build relationships, celebrate milestones, create memories and return as alumnae to gather and continue to do good as volunteers and leaders. Housing leadership is rewarding and such an important aspect of fraternity life.**



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## Frequently Asked Questions

### Who makes up a House Corporation Board?

- A house corporation board is made up of between 3-11 elected alumnae directors, three chapter officers, and the ATC. From the alumnae directors, the board elects a President, Treasurer, and Secretary. A Vice President may also be elected, if desired. The chapter officers represented on the House Corporation Board are the chapter president, chapter vp: finance, and the chapter director of house/property management. For housed chapters, the house corporation president will also select an Employment Committee Chairman (ECC) from the elected alumnae directors.

### How are directors elected to the house corporation board of directors?

- The board of directors are elected by the corporation (which includes the chapter membership, chapter alumnae, and anyone who has paid the fee to join the corporation) during the annual meeting. Directors may also be appointed to the board by the RHS or the board president when a vacancy occurs throughout the year. Appointed directors will be voted in at the next annual meeting, following their appointment.

### How long can a director serve on a House Corporation Board?

- An alumnae director who is elected to the board during the annual meeting may serve three two-year terms as a director. A term year runs from July 1 until June 30. Once she has completed three terms (6 consecutive years) she must then take two consecutive full years off of the board.

### How long can a director serve as an officer on a House Corporation Board?

- House corporation officers are elected at the first house corporation meeting following the annual meeting and voted on by the directors of the board, including the ex-officio members. If elected into an officer position, a director may serve a total of six consecutive years as an officer. She may serve in the same position or different positions, being reelected annually. After serving three terms or six consecutive years as a director or officer, she must take two consecutive years off of the board.

## Term Limit Waivers

- Under special circumstances, a house corporation director may submit a policy waiver to Council to lengthen a term as a director or an officer. Waivers are typically filed for a seventh consecutive year of service, or beyond.

## Who must be included in a house corporation meeting?

- The alumnae and ex-officio members are expected to work together when scheduling house corporation meetings and collegiate schedules should be a priority when scheduling meetings. A majority of the members of the board, including ex-officio members, shall constitute a quorum for the transaction of business as long as one collegiate ex-officio member is present. *Business may not be conducted in the absence of collegiate ex-officio members.*

## OVERALL INFORMATION

### A house corporation of a Delta Gamma chapter (organized as a corporation):

- Is composed of all collegiate and alumnae members who have paid the house corporation fees as required by the Delta Gamma Constitution and bylaws of that house corporation.
- Owns, rents and/or maintains the chapter house, lodge, suite or storage facility rather than the collegiate chapter because of the ever-changing collegiate membership.
- Is a separate, legal entity incorporated under a state or province charter.
- Seeks federal tax-exempt classification under Code Section 501(c)(7) from the IRS within one year of incorporation.
- Is administered by a house corporation board, composed of elected directors and ex-officio members.
- Owns or rents and/or maintains the chapter house, lodge, suite or storage facility and meets all financial obligations involved in ownership, renting and/or maintenance.
- Employs and oversees payroll of persons who assist the chapter (i.e., house director, cook, waiters, houseboys, etc. Catering companies should be treated as a regular vendor and should not be processed through payroll.)
- Executes annually a legal agreement (Annual Agreement) between itself and the chapter that states the financial and other obligations of the two groups to each other. Changes in the agreement may be made only through mutual consent and with the approval of the Fraternity Treasurer. Both the chapter and house corporation should have an annual budget that is understood by both parties.

- Charges a membership fee which is called the house corporation fee. The amount is determined by Fraternity policy for the type of housing provided.
- Charges annual rent, even if there is no housing. Rent (chapter obligation and facility rent, if applicable) is based on costs of debt retirement, rent to a landlord/university, insurance, payroll expenses, taxes, Convention, seminar, accounting fees, grounds upkeep, legal fees, maintenance, trash disposal, storage and small miscellaneous expenses.
- Reports annually to the chapter membership the financial condition of the house corporation (including the financial statement, Annual Report, the budget and the status of funds in the account).

### **What is a house corporation?**

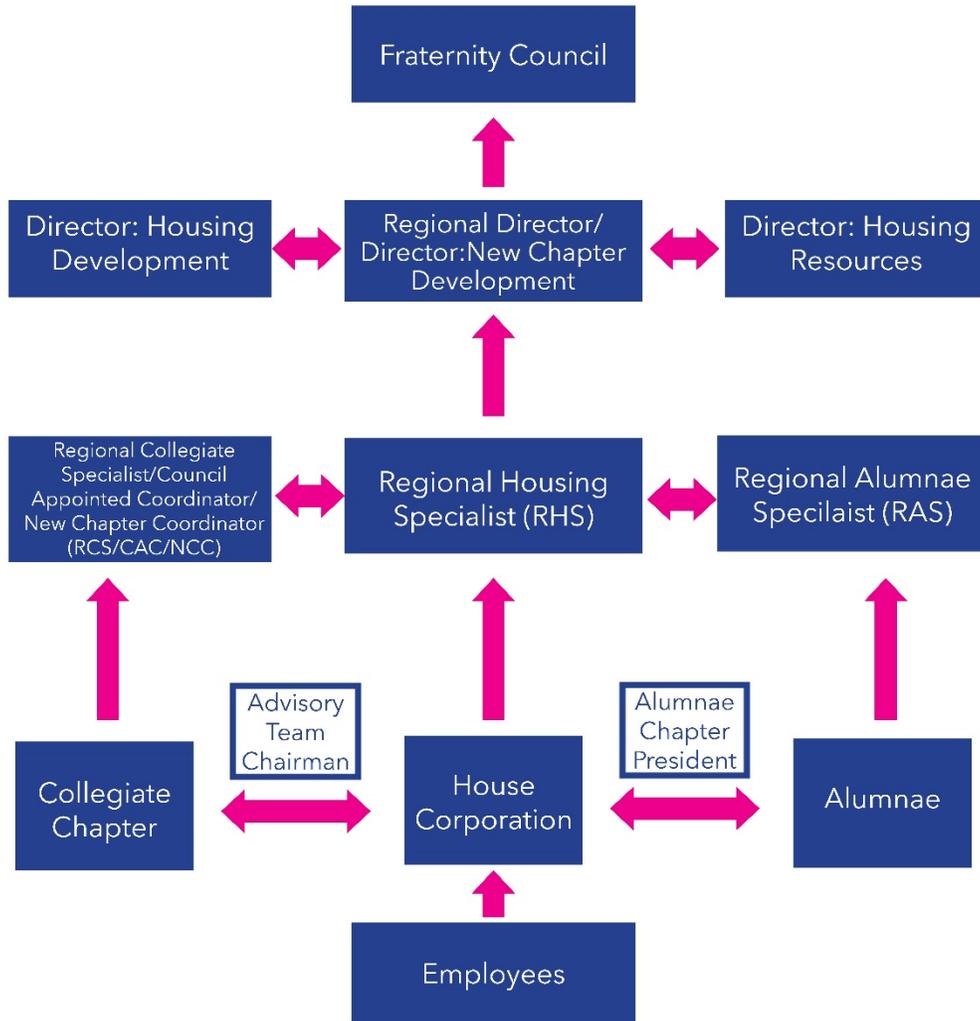
- It is the facility landlord, employer and the holder of insurance for the chapter and itself.
- It is usually a not-for-profit corporation incorporated in the state or province in which the chapter is located. It can also be a Limited Liability Company (LLC). It holds and protects the assets of the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

### **Who are the members of the house corporation?**

- Every initiated member of the collegiate chapter who has paid her house corporation fees during her first year of membership is a member of the house corporation of that chapter.
- Membership can also come from transfer students or alumnae initiated into another chapter who pay a designated affiliation fee. Many of the alumnae who serve on house corporation boards were initiated at chapters other than the chapter they presently serve.

# HOUSING LEADERSHIP

## Housing Organizational Chart



**Treasurer** is the elected member of Council who oversees and is responsible for all Delta Gamma Fraternity housing programs.

**Director: Housing Development** is appointed by Council. She directs the Regional Housing Specialists (RHSs) in supervising all major projects, including but not limited to, new construction, major renovations, acquisitions and sale of property and:

- Serves as a director of the Fraternity Housing Corporation (FHC) Board of Directors.
- Serves as a director of the Fraternity Management Corporation (FMC) Board of Directors.
- Serves as a member of the Fraternity Development Committee.

**Director: Housing Resources** is appointed by Council to co-direct the Fraternity's housing program. She directs the RHSs in supervising all house corporations and:

- Maintains a file on each house corporation.
- Serves as a director of the FHC Board of Directors.
- Serves as a director of the FMC Board of Directors.

*\* One of the Housing Directors may be the Chairman of the FHC Board of Directors and the other may be the Chairman of the FMC Board of Directors.*

**Regional Housing Specialists (RHSs)** are Fraternity officers who work with the house corporations in their regions. They:

- Serve as a liaison between the house corporations, the Fraternity, the Director: Housing Development and Director: Housing Resources, verifying that the house corporation is functioning properly, maintaining chapter housing and meeting financial responsibilities.
- Meet with the house corporation boards.
- Request information from the house corporation boards.
- Aid in enforcing Delta Gamma housing policies.
- Maintain a current roster of house corporation officers.
- Communicate with house corporation presidents and treasurers.
- Communicate with and mentor the chapter director of house management/chapter property and her adviser.
- Communicate with the FHC housing staff regarding each house corporation as needed.
- Train house corporation officers.
- Review preliminary house corporation budgets and approve final budgets.
- Serve as a member of the Regional Team.

## Office of Housing Staff at Executive Offices

- The Office of Housing (OOH) Staff is available to support house corporations and house directors. The staff can be reached via phone using this number: 614-487-5599.

## HOUSE CORPORATION BOARD RESPONSIBILITIES

All members and house corporations are expected to uphold all Delta Gamma Fraternity Policies. Housing related policies can be found under the “Policies and Positional Statements” and “8 – Housing Series” sections of the [Delta Gamma website Library](#). Exemptions to these policies are only explored through the submission of a policy waiver, found in the Forms appendix of this manual.

- Make a five-year plan for buying or building housing or for remodeling or redecorating housing. This is due by November 1.
- Collect rent from the chapter for a suite, room or other quarters rented from the college or university and pay the school rent.
- Neither the house corporation nor the chapter may collect deposits of any kind. Additionally, the house corporation may not fine the collegiate chapter but may recover actual costs associated with repairing damage, excessive cleaning or replacement of lost house corporation property through the FHC chapter receivables procedures.
- The standard Delta Gamma room agreement contains a paragraph in which the resident agrees to a reasonable search of her room and personal property. The decision to conduct a room search is not a house corporation board responsibility, decision or function. *House corporation directors do not participate in chapter room searches.*
- Pay all fixed expenses relating to ownership or rental of chapter housing when due, i.e., mortgage, taxes, insurance and payroll expenses.
- Provide adequate insurance coverage for the chapter house and its contents, including replacement costs of the house and furnishings and provide adequate liability insurance for the chapter and house corporation.
- Provide and maintain housing for the chapter which is comparable to other housing on campus. Delta Gamma housing should always be competitive.
- Purchase furnishings for the chapter housing including all dishes, kitchen appliances, large appliances such as commercial mixers, silverware, glasses, lamps, pictures, draperies, furniture and replace such items as needed.
- Examine the chapter house at the close of the school year to determine needed repairs or purchases to be made during the summer months.
- Arrange for repairs or purchases during school vacation and turn over well-equipped, cleaned and furnished housing to the chapter at the agreed upon time.
- Responsible for heavy cleaning of items such as draperies, carpeting and walls during school vacation.
- Maintain locks or keyless entry systems on outside doors of the chapter housing and ask the director of house management/chapter property to

conduct frequent key inspections. The house corporation may reasonably expect to replace outside locks every three years.

- Invite the house director to a board meeting to provide information to the board members when needed.
- Pay the fee for commercial general liability, fidelity bonding and director and officer liability insurance covering all house corporation officers to Executive Offices when billed, if blanket policies are provided by the Fraternity.
- Prepare the Annual House Corporation Report on Anchorbase by the due date of September 1.
- Hold at least four house corporation board meetings yearly for housed groups and two for unhoused groups, with the chapter president, chapter vp: finance, chapter director of house management/chapter property and advisory team chairman (ATC) in attendance. The meetings should be held in the chapter housing.
- Hold an Annual Meeting of the house corporation membership on or around the chapter's Founders Day. If not possible, the meeting should at least be in the spring semester/quarter of the collegiate chapter to enable the entire collegiate chapter membership to attend. All members of the corporation who have paid the house corporation fee (members of the corporation are initiated members of that chapter or members of another chapter, but who have paid the minimum house corporation fee stated in the house corporation bylaws) must be notified of the meeting's date, time and location pursuant to the corporation's bylaws. This can be accomplished through an advertisement in the Fraternity magazine, the *ANCHORA*.
- Responsible for snow removal, lawn care and yard maintenance.
- Ensure that every voting member of the house corporation signs both the Conflict of Interest and Whistleblower forms – including ex-officio members who are the collegiate president, collegiate vp: finance, collegiate director of house management/chapter property, ATC and local alumnae president.
- All voting members must disclose any potential conflict of interest to the board and OOH. Additionally, the member with the potential conflict should be excused from the meeting for discussion and should abstain from voting on any matter in which she has a potential conflict.
- Comply with Fraternity Constitution and all Fraternity policies and procedures which pertain to house corporations.
- Pay worker's compensation and unemployment insurance costs.
- Pay quarterly and annual payroll taxes to the IRS, state and local governments for employees on the payroll.
- Pay wages to employees hired to assist the chapter and distribute W-2 forms to employees and file W-3 forms with the IRS at year-end. Prepare #1099 for all contract employees earning more than \$600 per year (e.g., gardener, maintenance person, etc.).
- Arrange a meeting date with the collegiate chapter president to present the house corporation budget, future plans for chapter housing to chapter members and review the work done during the summer break.
- Confirm annually with the appropriate state agency that the corporation is in good standing and/or take appropriate steps to maintain standing. Many states require a form listing current house corporation officers to be sent

annually with an annual renewal fee to retain corporate good standing. If this is not done, the house corporation could lose its nonprofit status.

- Review and update house corporation bylaws annually.

## FHC VS. FMC VS. LLC: HOUSE CORPORATION BASICS FAQ

The Office of Housing (OOH) serves three different populations of Delta Gamma chapters.

1. Traditional local house corporations: The house corporations are made up of Delta Gamma alumnae who own and operate properties around North America.
2. Limited Liability Companies (LLCs): The LLCs are chapters with Delta Gamma owned property, but without a local house corporation. These properties are owned and operated out of the Executive Office.

Both local house corporations and the LLCs work with the Fraternity Housing Corporation (FHC).

3. The Fraternity Management Corporation (FMC) works with chapters without Delta Gamma owned property and no local house corporations.

The **Fraternity Housing Corporation (FHC)** was formed in 1989 to ensure standard accounting procedures were incorporated by local house corporations and to assist with tax return completion, payroll processing, accounts payable and receivable and insurance program administration. Today, FHC still assists house corporations in all the above listed areas and now also offers assistance in budget expertise, project management and financial analysis.

Because of the diverse campuses where our chapters exist, Delta Gamma realized that FHC was not one-size-fits-all when it comes to housing. Some of our chapters do not have any space. Some have a room or suite in a university owned space. Some have a floor of a residence hall where they live and have a Delta Gamma common space. Delta Gamma also found certain areas of the country where there were not many alumnae able to support the requirements of a local house corporation. In the cases where our chapters have no space, the house corporation was still required to have a house corporation with a minimum of three members.

To better meet the needs of our chapters and have alumnae able to serve in other needed capacities with our chapters, the **Fraternity Management Corporation (FMC)** was formed. The FMC assists chapters without Delta Gamma owned housing, often located in areas where recruiting volunteers has been historically difficult.

Moving the responsibilities of the house corporation to the national organization has allowed for better use of the volunteers we have while ensuring the chapter needs are met. FMC is responsible for purchasing and maintaining the assets needed by chapters and assisting with providing a space to chapters if needed.

Once FMC was established, Delta Gamma found another gap for our chapters – this time with Delta Gamma owned property. Starting in 2015, as Delta Gamma expanded to new campuses that required housing for our members. FHC and the Fraternity decided to purchase property on behalf of these new chapters. Instead of local house corporations, Delta Gamma formed **Limited Liability Companies (LLCs)**. These LLCs are owned and operated by the parent organization, FHC.

The LLCs range in house capacities from 3 to 84. Their day-to-day operations are managed by a dedicated FHC staff member as well as local volunteers. The ex-officio members of a traditional house corporation are also engaged to help in making decisions in regard to the FMC and LLC properties, including the ATC, chapter president, chapter vp: finance and the director of house management/chapter property.

The FHC Board oversees the LLC properties, and the FMC Board oversees the chapters under its umbrella.

### Becoming an FMC/LLC Group

What is the process for a chapter who is eligible to join FMC?

A chapter with less than three house corporation officers and no Delta Gamma owned housing will have the opportunity to join FMC. The existing house corporation will be dissolved with the state and IRS and the funds will be put in an account with FMC. FMC has its own paperwork and forms to complete as a 501(c)(7) organization, and its own board of directors. There will no longer be any responsibilities to fulfill, or fees paid, as a local house corporation when a house corporation dissolves and joins FMC.

### House Corporation and Chapter Communication

House Corporation and Chapter Communication Guidelines

The ATC, the chapter president, vp: finance and director of house management/chapter property must be included in all board meetings. The collegiate members must also be part of house corporation committees such as decorating/furnishings.

A good approach to get accurate information about the relationship between the chapter and the house corporation is to ask questions of the collegiate officers who attend the board meetings. Be sure they understand the topics being discussed, the items being voted on, and most importantly, the impact they will have on the chapter.

The entire chapter is also responsible for attending the annual meeting, typically held in the spring around the chapter's Founders Day. In the fall, the

director: house management should present the chapter's wish list to the house corporation.

A member of the house corporation should attend the new member meeting where the house corporation is discussed.

Other suggestions include asking the chapter to invite a member of the board to a chapter meeting to discuss house corporation finances, or to have a house corporation member meet with the live-in members of the chapter in the fall.

## **President**

Position description can be found in the [Fraternity & Foundation Volunteer Position Description Handbook](#).

### **BOARD GOVERNANCE**

Overall, as president, you will spend the bulk of your time managing the house corporation board. This involves setting and carrying out a vision for the board. Other board members will look to you for information regarding the big picture. Along with this, remember that you set the tone! You set the tone for progress, for working with the chapter and for the momentum needed to complete all tasks.

Make sure that the other board members have what they need to be successful in their roles. Be aware of all the resources available to them and be able to communicate the history of the chapter facility – what has been done, what is on the list, what is coming up, etc.

Make it a priority to build relationships with the chapter, the advisory team and your RHSs. Include the chapter officers that are on the house corporation board in your decisions and utilize them to establish trust with the chapter. The advisory team can be your allies and a liaison with the chapter members. They are important to have on your team. Your RHS is always available to support you, too.

You will also set the agendas for meetings of the house corporation.

### **CORPORATE RESPONSIBILITY**

As president of the house corporation, you will have certain legal corporate duties to perform as you are the head of the board. You will be required to sign contracts, leases and other legal documents on behalf of the corporation.

Please note, you will be signing for your position on the board, not as an individual, and the house corporation and the Fraternity are covered by insurance. So long as you are acting within the scope of your role as president and in the best interest of the corporation, your actions will be covered by the policy.

## RECRUITING NEW BOARD MEMBERS

When recruiting new board members, it is important to readily have access to the documents that can help you answer their questions about time commitment, responsibilities, etc. The [Fraternity & Foundation Volunteer Position Description Handbook](#) includes a position description for all house corporation board officers.

Additionally, the [Alumnae Dual Officer Grid](#) details which volunteer roles can be held simultaneously. In extreme cases where there is no one else to serve in a volunteer role, you can work with your RHS to request a waiver of the grid from Council. While possible, we want to be sure this is a last resort, and you will need to demonstrate that you've exhausted all recruiting efforts prior to making that request.

So, how do you recruit new volunteers? Here are some ideas on where to start but know that your RHS, RAS, and the local alumnae group are great resources in the process.

- **Start local.** The nearest alumnae group is a tremendous asset when it comes to recruiting new board members. Beyond word of mouth, they also might be able to share the names of members who are extremely active within the group. Additionally, they have social media and other communication tools, such as newsletters, where they can promote the opportunity to serve on the board.
- **Work with your RHS and RAS.** Your RHS or RAS may be able to gather a list of local alumnae or alumnae from the chapter you support who can serve on the board. Please be aware, this may mean some women serve in a virtual, that is, at-a-distance, capacity.
- **Ask the collegians and advisers for ideas.** The current officers and advisers for the collegiate chapter may have some ideas on women who could potentially serve on the board. They are an excellent group to check in with for names. It may also enable you to recruit some young alumnae to the board. Since women can volunteer for Delta Gamma right after graduation, but perhaps aren't ready to advise their peers quite yet, serving on the house corporation board is a great entry point to serving as a lifelong volunteer!

## HOUSE CORPORATION OFFICER TRANSITIONING

The best practice for a successful officer transition is to plan in advance and avoid any gaps during the transition. Once the new officers have been elected at the first house corporation meeting after the Annual meeting, set up a schedule for transition. Most annual meetings occur in March and April and the newly elected officers move into their roles July 1. Schedule several meetings during the months leading up to July to discuss the job description, any large projects planned for summer that are underway, any ongoing issues the position may be dealing with,

etc. It might also be helpful to let the newly elected officer shadow you during the last few months of your term, if appropriate and possible.

## COMMITTEE DESCRIPTIONS

The house corporation board may be assisted by chairmen and/or committees appointed by the board for special projects such as rebuilding, remodeling or redecorating. Committees may be appointed for a special project or for a specific period of time. Committee members do not need to be directors of the house corporation board and *all committees shall include both alumnae and collegians*. Committees are a great way to strengthen the relationship between a chapter and a house corporation board and allow the chapter to better understand what a house corporation board does.

### House Committee

- Inspects the chapter house, recommends necessary repairs and reports to the board annually on needs of the chapter and chapter house regarding housing.

### Furnishings Committee

- For housed groups, works with the house director on repairs, cleaning and replacement of furniture and on the redecorating and cleaning of the house during the summer. The house corporation should state clearly in its minutes the goals and objectives of the committee so that both the committee members and the board understand them fully.

### Capital Fundraising Committee

- The members of this committee need not live in the college community. Because appeals for funds are normally made by mail, a group of alumnae living in a community distant from the chapter house may perform this function. *Note: Only house corporations which have an IRS designation of 501(c)(7) may fundraise.*

### House Corporation Employment Committee

- The house corporation president shall appoint as chairman of the employment committee an elected director of the house corporation board. Employment committee membership shall be as follows: committee chairman, the ATC and one other collegiate member of the house corporation board appointed by collegiate chapter president. The employment committee will hire, train and hold a yearly performance review of the house director. The committee will share recommendations with the house corporation regarding any changes to payroll activity including raises and the addition or deletion of employees prior to the house corporation budget approval.

## Nominating Committee

- Appointed annually by the house corporation president and whose duties shall be to nominate and present at the Annual Meeting the names of the candidates for directors to be voted upon at that Annual Meeting.

## Interior/Architectural Committee

- Shall be appointed when redecorating is apparent. It is composed equally of alumnae and collegians. Suggested collegiate representation is as follows: one representative from each class or members elected by the chapter.

## HOUSE CORPORATION BOARD MEETINGS

Plan at least four meetings annually for housed groups and two for unhoused groups, with the collegiate president, collegiate vp: finance, collegiate director of house management/chapter property and ATC in attendance as voting members.

## ANNUAL MEETING

The house corporation Annual Meeting should be held on or around the collegiate chapter's Founders Day. If not possible, the meeting should at least be in the spring semester/quarter of the collegiate chapter's academic year to enable the entire collegiate chapter membership to attend.

- All members must be notified of the Annual Meeting as prescribed in the house corporation bylaws. Notice should be announced in the *ANCHORA*, if possible, for maximum delivery of the meeting date notice. The deadline for *ANCHORA* submission is October 15 for the winter edition and must be submitted via the Anchorbase Annual Meeting Information Task due on or before October 15.
- All collegians who have paid the total house corporation fee for that chapter may vote at the Annual Meeting.
- All collegians or alumnae who have been initiated at a different chapter and who have paid a house corporation fee to the one holding the Annual Meeting may vote at the Annual Meeting.
- Elections are held at this meeting for directors of the house corporation.

Annual Meeting Suggested Agenda:

1. Appointment of committee to approve Annual Meeting minutes
2. Reading of the minutes of the previous Annual Meeting and report of committee attesting to correctness
3. Treasurer's report
4. Reading of Annual Reports
5. Unfinished business
6. New business
7. Election of house corporation directors
8. Vote to approve new or revised bylaws, which have been reviewed and approved by the RHS

9. Vote to approve sale or placement of a lien against existing chapter facilities or purchase of new facilities
10. Adjournment

The bylaws should contain specific instructions or rules governing the Annual Meeting. New or revised bylaws which have been approved by the RHS are voted on at Annual Meeting.

## **INSURANCE**

The OOH staff works with house corporations in all areas of insurance.

Liability insurance coverage purchased under the Fraternity Master Liability Program through MJ Insurance, Inc. is mandatory for all house corporations. It is also mandatory for owned housing to be covered by a property policy that is on a "special forms" basis. We encourage you to consider getting a quote from MJ Insurance, Inc. should your property be covered locally. They have a unique policy geared specifically for women's fraternities and sororities. As they service over 20 of the 26 National Panhellenic Conference groups, they are often able to obtain rates that are lower than local carriers as well as offering much more robust customer service with regards to claims and many other resources. For access to their website, go to [www.mjsorority.com](http://www.mjsorority.com).

There are a variety of other coverages which may be purchased by house corporations. These are optional and you will find them to be broad and comprehensive in scope and competitive in price.

- Liability Insurance Policy
  - This type of policy covers such occurrences as bodily injury for those claims that occur at your property, or due to the operations of the Fraternity. This insurance must be carried whether a house corporation owns the house in which the members live, has a lodge, has rented quarters or has no quarters. Such liability insurance protects the Fraternity, its members and volunteers from claims resulting from either the Delta Gamma premises or the operations/functions of the Fraternity. All house corporations are covered under the Fraternity Master Liability Insurance Program. Delta Gamma Fraternity carries a \$1 million policy with a \$15 million additional umbrella.
- Crime Insurance Policy
  - These policies cover the Fraternity and all its related entities including alumnae groups, chapters, house corporations, house corporation employees, the Foundation, Fraternity Housing Corporation, etc. for embezzlements that may occur with their respective funds. This coverage is with Chubb Group Insurance, which is administered by MJ Insurance, Inc. There is a \$10,000 deductible for those clients who utilize a third party for compulsory internal controls. For those without a third party, there is a \$100,000 deductible. Since all house corporations utilize the services of the Fraternity Housing Corporation, the internal controls

requirement is fulfilled for all funds held at FHC. Local accounts are discouraged unless necessary by a lending institution. Local savings and checking accounts are subject to the higher deductible.

- Property Insurance Policy
  - This covers the physical properties that the house corporation either owns or is legally obligated to insure, i.e., lease agreements. As mentioned above, house corporations have the option of either insuring their property under the Fraternity Master Property Program or placing their coverage locally. The only exception is if the house corporation has a Fraternity or FHC loan. If so, the house corporation is required to insure its property under the Fraternity Master Property Program. Travelers Insurance Company is the carrier for the Fraternity Master Insurance Program administered through MJ Insurance, Inc. Travelers has an A+ (Excellent) rating through the insurance industry. The deductible for house corporations with building coverage is \$5,000 per occurrence. For those with content coverage only, the deductible is \$1,000 per occurrence.
  - Should coverage be placed locally, it is incumbent upon the house corporation that the coverage be on a comprehensive basis, called "special form," or sometimes referred to as "all risk."
  - Other considerations include:
    - Business income coverage for rental income should be covered in case the house becomes uninhabitable for a period of time due to a property loss. The amount of insurance is determined by the amount of annual income the house corporation receives from the members of the collegiate chapter.
    - Personal property or contents need to be insured on the same coverage basis as the building insurance.
    - Boiler and Electrical Equipment coverage should be considered if you have a pressurized vessel on your property. The peril of steam explosion is excluded under the property form, so it needs to be covered elsewhere. Even if you do not have a pressurized vessel, you may want to consider buying this coverage because it also covers mechanical damage which is a "warranty-like" coverage. Any type of electrical equipment such as AC units or water heaters may be covered under this arrangement.
    - Other riders may be needed should you have fine arts type of contents, such as paintings, musical instruments, rugs, silverware or silver sets.
  - There should be a periodic review of the building and personal property values to ensure that adequate limits are maintained. We encourage all properties to be insured on a replacement cost basis.
  - The personal belongings of members and employees are not covered under the house corporation policy, except for \$5,000 renter's insurance provided to the house director. The collegians' belongings are generally covered by their parents' homeowner's policies. The house director should consider a tenant policy to cover her personal

liability exposure. If there is a theft where the total loss (could be one member or multiple members) is very high, this extension may also cover the loss up to a specified limit. OOH can provide you with up to date information on this coverage.

- If the house corporation has a loan from any Delta Gamma entity, that entity must be named as the Mortgagee on the comprehensive policy, since it is the holder of the note which is secured by the mortgage lien.
- Worker's Compensation Insurance Policy
  - This covers the lost wages and medical expenses of an employee who has been injured on the job. This insurance is mandated by each state. House corporations not in monopolistic states such as Washington, North Dakota and Ohio are covered through our insurance agent, MJ Insurance, Inc. Travelers Insurance Company is the carrier used by MJ Insurance, Inc. with an A+ rating.
- Automobile Insurance
  - The Fraternity carries automobile coverage for hired autos. Autos your employees, alumnae and collegians rent on behalf of the Fraternity do not require the purchase of additional damage coverage from the rental car company, except in Canada. Non-member volunteers are not protected by this policy, nor are the autos of employees or members who own, lease or borrow covered that are not used in connection with Fraternity business. Members and employees must look to their own insurance policy for protection. Copies of insurance cards can be found in the [MJ Leadership Orientation Packet](#).
- Directors and Officers Liability Insurance
  - The Fraternity carries a blanket liability policy covering all its entities (collegiate chapters, alumnae groups, house corporations, Foundation, etc.) to protect against wrongful acts by its officers or directors. Such acts include: any actual or alleged error, misstatement, misleading statement or act, omission, neglect or breach of duty by one or more of the individuals insured while acting in their capacity as authorized representatives of the Fraternity. An individual must have paid her per capita dues for this coverage to be in force.
- Inventory/Appraisal
  - House corporation records should include an inventory of furnishings, equipment, cost of construction or purchase of the house or lodge (if one is owned), exclusive of the land. The purpose of the inventory is to establish values in case of insurance claims. Photographs of all furnishing should be attached to the inventory sheets; a video is also acceptable. A copy of this information should be maintained offsite and in a secure location. Please note that house corporations should submit an Insurance Profile and/or Appraisal upon request of the Office of Housing at Executive Offices.

- Getting Enough Coverage
  - *Buildings*
    - In choosing a limit of coverage for your house, the valuation method to keep in mind is the replacement cost of the structure. This can be substantially different than other methods of valuations, such as:
      - Market value
      - Mortgage balance
      - Assessed value for taxation
      - Balance sheet value
    - The insurance coverage assumes that you would plan to replace your house with a structure of the same kind and quality. Therefore, your principal consideration would be the average costs charged by a local contractor to rebuild the house. Short of soliciting a construction bid from a contractor, the best way to derive an accurate replacement cost is through a formal calculation process. MJ Insurance, Inc. can do this for you, or you can obtain the services of a local appraiser. Other methods of valuation should not be considered.
    - The exception to this procedure concerns buildings you do not plan to replace if destroyed. We recommend you either do not ensure such buildings or insure them only for the cost to demolish the undamaged remains.
  - *Contents*
    - This term refers to anything that is not permanently attached to the house (furniture, dishes and cookware, appliances, drapes, etc.). Your insurance only considers the replacement cost, which will vary greatly between houses.
    - It is suggested that each room in the house is videotaped. The video should show opened cupboards and closets, revealing the contents within. For any property where size is an important aspect of values, an object of known size should be included so to achieve proper perspective. This will assist in deriving a replacement cost figure for insurance purposes, as well as providing accurate documentation should a loss be suffered. The tape and copies, if possible, should be kept someplace other than the chapter house.
  - *Yearly Inspections*
    - It is recommended that two property and life safety inspections occur yearly.
- Loss of Income/Extra Expense
  - The amount of coverage needed to adequately ensure these exposures to loss depends on the amount of time needed to repair the house following a major loss. Should the loss render the house uninhabitable, the income stream will be lost as members stop paying or additional costs may be incurred as temporary facilities

will be needed to house the members during the repair period. Often, temporary facilities are contractually obligated.

- *Loss of Income* is calculated by multiplying the monthly income by the number of months required to repair the house.
- *Extra Expense* can be calculated by considering the gross cost of providing alternate facilities and services, then deducting the normal cost of operating the house. This calculation provides the net extra expense. Additional services may include food, laundry and transportation. The accessibility to short-term, unoccupied living space nearby is also an important consideration.

While the hope is that nothing ever happens to Delta Gamma houses, it is necessary to be prepared to handle any catastrophe. In the event of structural or content damage, the following steps should be followed to ensure the immediate safety of our women and the reduction of expenses.

- Reference [MJ Leadership Packet](#) in library.
- Reference information for insurance
- If there is a claim, contact MJ Insurance at 1-888-442-7470 immediately and ask for Heather Cox.
  - If you have any questions regarding a potential claim, you are welcome to contact Mandy Reymann at OOH, who serves as the liaison to MJ Insurance. She can be reached at [mandyr@deltagamma.org](mailto:mandyr@deltagamma.org) or 614-487-5599.
- MJ will open a file claim.
- MJ will contact a local adjuster to review the damage at your location.
- Should a claim result in a significant disruption of chapter operations, please notify your RHS. She will work with the regional team and housing directors to support the house corporation and chapter until normal operations can resume.
- It is preferred that work does not begin until after the adjuster sees damage (usually within 24-48 hours). However, take immediate action if needed to ensure the safety of members and prevent additional damage.
- The adjuster will work with the appointed house corporation member regarding the loss, coverage, what may be needed and will keep you updated on the claim.
- Contact vendors to repair damage.
- Any questions on the process or status of your claim should be directed to MJ.
- MJ will notify FHC when a claim is opened, and the Accounts Payable Specialist (APS) that works with your region will start a file.
- The house corporation should contact their designated APS to provide date of loss and a short description.
- All vendor bills and paperwork relating to the claim should be sent to the designated APS at OOH.
- FHC will pay all the vendor bills submitted and track all expenses that are related to the claim. (Please mark all claim materials as "insurance.")
- The APS will work with MJ to ensure paperwork/payment is in order.

- The APS will also review the file to ensure all funds have been received and, if not, submit a request to MJ for additional funds. Once completed, the file will be closed.
- The APS notifies the house corporation when the funds are received and the claim is closed.

## RISK MANAGEMENT AND CRISIS RESPONSE PROCEDURES

### Risk Management Philosophy

- Delta Gamma Fraternity's Risk Management Philosophy seeks to empower members to make informed decisions in high-risk situations, based on Delta Gamma Fraternity's purpose and organizational values, especially social responsibility and personal integrity.
- The Delta Gamma Risk Management Philosophy upholds the following:
  - While adherence to Delta Gamma policy and local, state, provincial and federal laws is expected, the Fraternity recognizes its members will make informed, fair and reasonable choices regarding their personal safety while acting with social responsibility and personal integrity at all times, even if in violation of Delta Gamma policy and/or local, state, provincial and federal laws.
  - The Fraternity believes that risk management is everyone's responsibility. Every member has the responsibility to keep themselves, their sisters, their chapter, their campus and the overall international organization safe.
- The Delta Gamma Fraternity Risk Management Philosophy promotes intentional education through multifaceted programming and well-informed individual decision-making by Delta Gamma members resulting in them doing good for not only for their communities but for their own health and wellbeing.

### What to Do in a Crisis

- Delta Gamma classifies a crisis as any event where emergency personnel are involved (death, injury, fire, etc.) or national media may be involved. If a crisis does occur, Delta Gamma has a policy that governs the actions of those involved. Outlined below are the basics of navigating crisis response:
  - The chapter president is in charge.
  - Crisis Communication should begin. The first step is for the chapter adviser or chapter president to email [crisis@deltagamma.org](mailto:crisis@deltagamma.org). The Collegiate Development Specialist (CDS) monitors all communication in the time of a crisis and serves as the main point of contact for anyone on the local, regional or international level.
  - Under guidance of the CDS and Regional team, if applicable, the chapter should hold a private meeting to discuss next steps.
  - Parents should not be contacted.
  - No one may make statements to the media.

- The house should be closed to all non-members until the situation subsides.
- Do not remove or disturb any personal belongings in the woman's room unless instructed to do so by the woman or her family.
- If a member passes away and lives in the house, close off her room and relocate her roommate temporarily.
- Reference [Crisis Communication Policy](#) in the Delta Gamma Library.
- Reference [Crisis Management Quick Reference](#) in the Delta Gamma Library.

## PANDEMIC RESPONSE

For information related to house corporation response to a global pandemic, please see the resources provided for [COVID-19 response](#) on the Delta Gamma Library.

## SECURITY SYSTEM BASIC REQUIREMENTS

### Security Systems

- Adequate security measures must be in place to ensure the safety of women living in Delta Gamma housing. The following should be considered before installing a security system in a chapter facility:
  - Is the keypad close to the main entrance(s) of the house?
  - Who is responsible for arming the system each evening? (*Note:* Systems with automatic timers are available.)
  - What hours will the system be armed?
  - How often will the code be changed?
  - Will a panic button be available? (*Note:* When pushed, the panic button automatically contacts 911 and/or local municipal fire or police.)
  - Will windows be armed? If so, does it allow windows to open partially?
  - Who will be the security company contact during school breaks?

### Basic Fire Safety Requirements

- Kitchen clean and free from possible sources of grease fires
- Fire doors kept closed
- Clear hallways
- Lighted signs marking exits
- Smoke detectors, sprinkler system and fire extinguishers
- Posted evacuation plan
- Required fire drills
- Emergency lighting

A checklist for use during fire drills can be found in the Appendix.

## AMERICANS WITH DISABILITIES ACT (ADA) COMPLIANCE

The Intent of the ADA is to provide persons with disabilities with accommodations and access equal to, or similar to, those available to the general public. It was signed in July 1990 and became effective January 26, 1992.

The ADA is a civil rights law, not a building code, and it consists of four "Titles."

- *Title I, Employment:* You cannot discriminate against a person with a disability in hiring or promotion if the person is otherwise qualified for the job. Employers must provide "reasonable accommodation" to persons with disabilities, including such steps as job restructuring and modification of equipment. At the present time, the law applies to employers of 15 or more. The definition of "disabled" is quite broad.
- *Title II, Public Services and Transportation:* Applies to state and local governments.
- *Title III, Public Accommodations:* If you are a "Public Accommodation," as defined by the law, you must remove architectural and communications barriers in existing facilities provided it is "readily achievable." In addition, you must provide auxiliary aids and services when they are necessary, provided this does not constitute an "undue burden." A "Commercial Facility" need only provide "reasonable accommodation" to allow disabled employees to enter and use the facility unless it undertakes alterations or new construction after January 26, 1992. The ADA does not require alterations except for the removal of barriers. Any alterations or new construction after January 26, 1992, of a "Public Accommodation," or a "Commercial Facility," must fully comply with the law's provisions.
- *Title IV, Telecommunications:* Applies to companies offering telephone service to the public.

Unfortunately, the law is not clear on whether sorority houses are considered "public accommodations" or "commercial facilities."

- The definition of "public accommodation" requires categorization of the facility into one or more of 12 descriptions. One of these descriptions is that the facility be a place of lodging (inn, hotel or motel).
- The definition of a "commercial facility" specifically notes that the facility is intended for non-residential use by a private entity. The continued emphasis on the private nature of sorority organizations works in favor of this definition, and draws a distinction between sorority houses, used only by members, and motels and other like places of lodging, which cater to the public-at-large.
- Continued observation of this law is necessary, as it is applied to 59 test cases.
- For additional information, a summary is available from:  
Building Owners and Managers Association International  
1201 New York Avenue, N.W., Suite 300  
Washington, D.C. 20005  
Phone: 202-408-2662  
Fax: 202-371-0181
- Should the house corporation contemplate any construction projects, it is recommended to integrate a review of this law's requirements into your research.

## WORKING WITH THE COLLEGIATE CHAPTER

## Honor Board

- Honor Board is the accountability structure within each Delta Gamma chapter. Honor Board processes are led by the vp: social standards.
- Should you have a concern related to housing policy violations, the appropriate contacts to start the process with Honor Board are the vp: social standards, the chapter president or the ATC.

## Relevant Processes

- Annual Agreement
  - Every house corporation must have a written agreement between the chapter and the house corporation describing financial and other responsibilities of both parties. This agreement should be completed in the spring for the upcoming academic year. The housing situation determines which Annual Agreement form will be utilized. These forms are provided by OOH. If circumstances warrant, an Annual Agreement may be amended by consensus of the collegiate chapter, the house corporation board and the RHS. Any amendment requires ultimate approval by vp: finance.
  - The Annual Agreement no longer contains information about a damage deposit as neither house corporations nor chapters may collect deposits of any kind. The actual cost of repairs beyond normal wear and tear can be billed back to the chapter through the FHC Chapter Receivables procedure.
- Annual House Corporation Meeting
  - Schedule an Annual House Corporation Meeting, in accordance with the bylaws, for the entire membership of the house corporation on or around the collegiate chapter's Founders Day. If such planning is not possible, the meeting should be held in the spring semester/quarter of the collegiate chapter's academic year to enable the entire collegiate chapter membership to attend. A notice must be sent to the *ANCHORA* by the appropriate deadline in order to comply with the bylaw requirement to notify all members of the Annual Meeting. For more information on this process, please refer to the [Annual Meeting section](#).
- Bylaws
  - Bylaws must be reviewed annually with house corporation board members and should be updated each year at the Annual Meeting. Any amendments should be held for consideration at this time. The updated bylaws should then be uploaded to Anchorbase using the Bylaws task.
- Annual Report
  - Every house corporation must complete the Annual Report on Anchorbase. The task is due on or before June 30 of the current fiscal

year and should be completed by the house corporation president and secretary.

- Major Projects Approval Process
  - From time to time, house corporations may need to embark on a major project. Major projects are defined as new construction, a major renovation to an existing structure or significant changes to the house or property. If you are considering a major project, see the [Major Projects Approval Process](#) in the Delta Gamma Library.
- Dissolution Procedures
  - Should the collegiate chapter be closed, the house corporation may be dissolved. Please refer to the *Processes* section of this manual for more information.

## Vice President

Position description can be found in the [Fraternity & Foundation Volunteer Position Description Handbook](#).

## Treasurer

Position description can be found in the [Fraternity & Foundation Volunteer Position Description Handbook](#).

## REPORTING OBLIGATIONS OF A HOUSE CORPORATION

### Annual Report

- Each house corporation is required to file an Annual House Corporation Report with Executive Offices.
- Annual reports must be completed on Anchorbase by June 30 every year.
- Most states require an Annual Report to be filed, which is separate from the report required by Delta Gamma. OOH will complete this form and remit the required payment if the form is either available online or is sent directly to OOH. There are other local and state reports that may be required, including permits, licenses or other government forms. Some states will only send these documents to an “Agent of Record.” Director: Housing Operations serves as this agent for administrative purposes.
  - In some states, the agent must be a person with an address in the state where the form is required. It is then the responsibility of the house corporation officer assigned to this role to scan the form and report to OOH in a timely manner so the form can be completed and sent with relevant payment by the due date. If that officer changes or terms out, a change in agent form can be submitted by OOH on behalf of the house corporation.

- FHC uses information from the annual report to report to Council and the Fraternity.

### Tax Reports

- OOH staff will file federal, state and local tax reports for all house corporations.
  - Federal Tax Reports
    - Each house corporation, having secured its exemption classification and its employer identification number (EIN), must file IRS Form 990, 990N or 990EZ annually with the IRS. Extensions are filed for all 990 forms. Due date is then extended to May 15.
  - State and City Tax Reports
    - In some states, additional state and/or city tax reports must be filed by house corporations. Each house corporation should investigate these responsibilities to see that all such requirements are met each year. House corporations should forward filing notices to [FHCTax@deltagamma.org](mailto:FHCTax@deltagamma.org).

### UNRELATED BUSINESS INCOME & SET-ASIDE FUNDS

*The set-aside procedures as described herein does not apply and cannot be used by those house corporations exempt under the 501(c)(2) classification.*

Unrelated business income is derived from a trade or business or not substantially related to furthering the exempt purpose of the organization. For most house corporations, interest income is the only unrelated business income. Unrelated business income over \$1,000 is taxable to the house corporation and reported to the IRS on form 990T. However, house corporations exempt under 501(c)(7) may avoid tax by electing to “set-aside” unrelated business income over \$1,000. House corporations will be notified after the close of the fiscal year (June 30) if there is unrelated business taxable income. The house corporation board votes to set-aside unrelated business income by means of a resolution. A signed copy of the resolution is added to the house corporation’s Minute Book.

Suggested Set-Aside Resolution (in the corporate minutes):

At a meeting of (name of house corporation), on the \_\_\_\_ day of 20\_\_\_\_, after discussion of the net investment income for (name) in the fiscal year ending \_\_\_\_, 20\_\_, the following motion was duly made, seconded and unanimously resolved as follows:

Resolved, that the amount of \$\_\_\_\_ be set-aside from the general assets of (name) in a separate fund.

Resolved, further, that said amount of \$\_\_\_\_ be used only for the following purposes: religious, charitable, scientific, literary or educational purposes, or

for the prevention of cruelty to children or animals, in accordance with Section 512(A)(3)(B)(I) of the Internal Revenue Code of 1986.

Elected set-aside funds will be moved from “available cash” to a new account named “set-aside” on July 1 of the new fiscal year. These accounts will appear on the Balance Sheet as follows:

###-000-001-1990 Available Cash  
###-40-000-1010 Set-Aside

When submitting an invoice for payment, please indicate payment should be made from set-aside funds.

### Restrictions of “Set-Aside” Funds

- The “set-aside” amount can only be used for scientific, educational or philanthropic purposes in accordance with Section 512 (A)(3)(B)(I) of the Internal Revenue Code of 1986. Examples of these expenses are donations to 501(c)(3) charities (like the Delta Gamma Foundation), contributions to educational institutions or the purchase of computers for a study room. Educational items purchased for use in bedrooms, or other areas not defined as a study room, cannot be purchased with “set-aside” funds.
- All “set-aside” funds must be utilized in three years from the year earned, not the date set-aside.
- If “set-aside” funds are used for non-qualifying purposes, the amount is reported as taxable income. Examples of non-qualifying purposes include social events, expenses of repairing or maintaining a chapter house or a desk for a bedroom.

House corporation officers must be knowledgeable of current tax laws. Failure to comply with IRS regulations could result in assessment of back taxes, penalty and interest.

All corporations established as nonprofit corporations are required to seek a tax classification of the corporation from the IRS. Canadian house corporations have similar requirements from their internal revenue agency.

New house corporations must be incorporated in the state where the chapter is located and obtain an EIN prior to filing for an IRS tax status.

## REVENUE AND EXPENSE KEY

### Revenue Codes (Effective July 1, 2015) – in numeric order

|      |                        |  |
|------|------------------------|--|
| 4315 | House Corporation Fees | The mandatory one-time fee paid to become a life member of the house corporation. The fees are used to finance large home maintenance projects, such as major repairs or additions, and to build reserves for future expenses not covered by rent. |
| 4330 | Payroll Reimbursement  | The reimbursement from the chapter for payroll, which must be equal to the total of salaries, payroll taxes (employee/er) and payroll preparation charges.   |
| 4335 | Capital Reserve Fund   | Populated directly from Schedule A-3. It represents the amount needed from the collegiate chapter to fund future capital expenses. It is combined with Chapter Obligation on the Annual Agreement and invoiced as one-dollar amount.               |
| 4340 | Chapter Obligation     | The amount paid to the house corporation by all chapter members regardless of whether housing is provided. This covers house corporation annual expenses, such as insurance, accounting fees, mortgage payments and taxes, if applicable.          |
| 4341 | Facility Rent          | The amount paid to the house corporations by members who live in the house. This rent covers the member's room.  |
| 4345 | Reimbursements /Claims | Refers to reimbursement from companies that supply coin-operated laundry or vending machines and/or reimbursement for insurance claims.  |
| 4405 | Contributions***       | Contributions or donations from Delta Gammas.  |
| 4415 | Chapter Gifts***       | Given from year end surplus; if from accumulated surplus, must be approved by vp: finance.   |
| 4605 | Investment Income      | Interest earned on investments such as savings account, checking account, certificate of deposit or interest paid by FHC.  |

## Expense Codes – in numeric order

|      |                             |   |
|------|-----------------------------|---|
| 6210 | Salaries                    | The amount designated solely for the salary portion of the payroll, including any taxable allowances.   |
| 6211 | Salaries paid to University | The amount charged for university or college employees who work for the house corporation.  |
| 6220 | Payroll Taxes               | All taxes related to payroll.   |
| 6230 | Benefits                    | Additional items found in the employee's contract, such as health insurance, cable/internet and personal cell phone use.  |
| 6240 | Workers' Compensation       | Payment of workers' compensation; only for groups who do not use MJ Insurance.  |
| 6270 | Employee Fees               | The administrative charges associated with preparing a payroll and all related tax forms by the payroll company or FHC and EMS fees.  |
| 6310 | Postage                     | Any postage used by the house corporation to send mailings to the alumnae, chapter or Executive Offices staff. If the house corporation rents a post office box, this amount should also be included.                     |
| 6410 | Phone/Cable /Internet       | To be used for the monthly charges incurred by house corporation officers or house director (per contract) for the operation of the business.   |
| 6520 | Fundraising***              | Expenses associated with doing a fundraising campaign (postage, paper, invitations, fliers). This does not include payments to a professional fundraising firm.   |
| 6521 | Professional Fundraising*** | Expenses paid to a company to manage a fundraising campaign (e.g., Pennington).   |
| 6530 | Supplies                    | Items for conducting business of the house corporation, such as office supplies. It is not to be used for chapter consumables (e.g., toilet paper or light bulbs). All disposable items are the chapter's responsibility. |
| 6540 | Chapter Expenses            | Items that the house corporation pays for but are chapter expenses. These are tracked via this account code but are then billed back to the chapter once or twice a year.   |
| 6550 | Household Furnishings       | Items which are less than \$500 and which do not have an extended life or are regularly replaced (e.g., towels, utensils or tablecloths).   |

|      |                       |   |
|------|-----------------------|---|
| 6610 | Trash/Utilities       | Unless the chapter has arranged for the house corporation to pay the utilities for the entire fiscal year, chapter pays utilities. This means, the budget for this account should be \$0 or should be enough to cover 12 months for every utility in the house. |
| 6620 | Standard Cleaning     | Repetitive cleaning done by a cleaning service or independent cleaning contractor throughout the year, including cleaning supplies purchased for the use of staff/employees. Cleaning supplies for chapter use are not included.                                |
| 6621 | Custom Cleaning       | Cleaning that does not happen repetitively during the year, such as carpet or draperies. Includes any work done to open a house in the fall. Cleaning supplies for chapter use are not included.  |
| 6625 | Catering              | Catering service costs for the duration of the school year. This amount could be contractual or on a weekly/monthly basis. If the caterer submits invoices for the food, those expenses will be included.   |
| 6630 | Home Maintenance      | Any maintenance done to the existing house or residence which maintains the value of the structure (e.g., plumbing, electricity or windows). New items or upgrades over \$500 may be capitalized (refer to attached fixed asset listing below).                 |
| 6650 | Grounds Upkeep        | Any regular grounds work (e.g., mowing, pest control, snow removal and tree trimming), but does not include major landscaping.  |
| 6660 | Fire/Security Systems | Preventative maintenance/inspections and monitoring of fire and security systems (including the dedicated phone line for fire alarm). Not to be used for repairs or emergencies.  |
| 6670 | Equipment Maintenance | Any preventative maintenance for equipment, such as heating/cooling systems, copiers and large kitchen.   |
| 6680 | Property Taxes        | If you receive a notice regarding a rate change for the upcoming fiscal year, please send to FHC.   |
| 6685 | 990T Taxes            | For those who pay federal taxes, this is to be used for amounts paid to the IRS for annual 990T filings.  |
| 6688 | State and Local Taxes | For those who pay state or other taxes, this is used for amounts paid to the state and local authorities for applicable taxes.  |

|      |                            |   |
|------|----------------------------|---|
| 6690 | Information Technology     | Any maintenance or troubleshooting fees, including monthly service contracts, for computer or internet hardware and systems or web design.  |
| 6710 | Rent Expense               | Those who pay rent should budget for the fiscal year July 1 – June 30. Be sure to check for any increases ahead of time.  |
| 6720 | Equipment Rental           | Annual rental fee for any equipment (e.g., copier, washer, etc.). Include temporary rentals of special event tents, tables, chairs, etc.  |
| 6730 | Storage Rental             | Budget for the fiscal year July 1 – June 30. Moving costs for transporting furnishings to and from locations should be included into the total expense.   |
| 6810 | Depreciation***            | <p>To expense purchased assets over their useful life. Most house corporations have a set schedule of depreciation as evidenced by their IRS 990 filings. The FHC depreciates as follows:</p> <ul style="list-style-type: none"> <li>• Computer, computer related equipment 3 years (1730)</li> <li>• Small appliances 5 years (1735)</li> <li>• Interior improvements/furniture 7 years (1725)</li> <li>• Building and land improvements (\$2000 - \$5000) 10 years (1750, 1755)</li> <li>• Building and land improvements (\$5000+) 20 years (1720, 1710)</li> <li>• New building/addition 30 years (1715)</li> <li>• <i>Example: If a \$150,000 renovation is depreciated over 20 years, \$7,500 is expensed under depreciation annually.</i></li> </ul> |
| 6920 | Insurance                  | Annual premium for general liability, bonding, building and contents, and boiler, if applicable. This figure will be on your proposed budget, as provided by MJ Insurance, and cannot be changed.   |
| 7110 | Professional Services      | Any legal counsel, designer consulting or security services.  |
| 7120 | Accounting Fees            | FHC charges or costs associated with annual bookkeeping done by a CPA or accounting firm.   |
| 7130 | Other State and Local Fees | Annual incorporation fees, business tax, health permits and any other fees charged by the state or local government that are not related to property or income taxes.   |

|      |                      |  |
|------|----------------------|--|
| 7210 | Gifts                | Gifs or contributions given by the house corporation. This does not include gifts given to the collegiate chapter or chapter members.  |
| 7211 | Chapter Relations*** | Chapter related gifts. This will include funding CDC and Fraternity visits for the chapter, as well as welcome treats, chapter retreats, attendance at Founders Day for collegians, etc. |
| 7220 | Scholarships***      | Money given to the Delta Gamma Foundation for academic purposes only; may not be given for dues. Follow the scholarship application process.   |
| 7510 | Interest Expense     | Interest (not principal) payments on all loans for one entire year.  |
| 7940 | Bank Charges         | Applies to local bank account fees. If there is a monthly service fee, this should be budgeted for the year.   |
| 8070 | Training Fee         | Amount to be charged by FHC for sending house corporation representatives to training venues.  |
| 9990 | Other Expenses       | Miscellaneous items such as subscriptions, memberships, ads or invitations. If over \$1,000, please attach an itemized listing.  |

\*\*\*Denotes codes are not on the operating budget (Schedule B). Please see Schedule A or Cash Reserve Wizard.

## FIXED ASSET ACCOUNT KEY

|      |                          |   |
|------|--------------------------|---|
| 1730 | 3 YRS – \$500+           | <ul style="list-style-type: none"> <li>• New computers and related equipment</li> <li>• Installation of internet cables</li> </ul>  |
| 1735 | 5 YRS – \$500+           | <ul style="list-style-type: none"> <li>• Televisions/stereo</li> <li>• Water heaters, pumps</li> <li>• Air-conditioning</li> <li>• Small appliances</li> <li>• Office equipment</li> <li>• Washers and dryers</li> </ul>              |
| 1725 | 7 YRS – \$500+           | <ul style="list-style-type: none"> <li>• Interior improvements</li> <li>• Furniture</li> <li>• Lights</li> <li>• Carpets and other flooring</li> <li>• Commercial kitchen equipment</li> </ul>  |
| 1750 | 10 YRS – \$2000 - \$5000 | <ul style="list-style-type: none"> <li>• Land improvements</li> <li>• Parking</li> <li>• Landscaping</li> <li>• Pools</li> </ul>  |
| 1710 | 20 YRS – \$5000+         | <ul style="list-style-type: none"> <li>• Land improvements</li> <li>• Paving</li> <li>• Landscaping</li> <li>• Pools</li> </ul>   |
| 1755 | 10 YRS – \$2000 - \$5000 | <ul style="list-style-type: none"> <li>• Building improvements</li> <li>• Roof</li> <li>• HVAC</li> <li>• Windows</li> <li>• Network and electrical wiring</li> <li>• Plumbing</li> <li>• Exterior painting (over \$5,000)</li> </ul> |
| 1720 | 20 YRS – \$5000+         | <ul style="list-style-type: none"> <li>• Building improvements</li> <li>• Roof</li> <li>• HVAC</li> <li>• Windows</li> <li>• Network and electrical wiring</li> <li>• Plumbing</li> </ul>   |
| 1715 | 30 YRS                   | <ul style="list-style-type: none"> <li>• New building</li> <li>• House additions</li> </ul>   |

This is not a complete list; however, they are the main expenditures used in these accounts. Expected purchases of these items should be listed on Schedule A of your annual budget form and will come out of your reserves, not your operating expenses. If you are unsure as to which account your item should be coded, please call your APS or the Housing Operations Accounting Manager.

## **LOAN PROCESSES**

[See Loan Application Process.](#)

## **MONTHLY FINANCIAL REPORTS**

Each month on the 5<sup>th</sup> day of the month, the house corporation president and treasurer will receive three emails, including the Balance Sheet, Revenue and Expense and General Ledger. If the 5<sup>th</sup> day of the month falls on the weekend, the reports will be sent on the closest business day. You may request additional officers to receive these reports. Below is a brief description of each report.

### **Balance Sheet**

- This report is run the last day of the previous month. It reflects the balance in all local and/or investment accounts in addition to the funds held at FHC on behalf of the house corporation.
- It is in numerical order, starting with any local accounts at the top. It then lists all house corporation assets (accounts in 1700s). These are non-cash assets, such as furnishings and equipment, as well as the facility itself. They depreciate on an annual basis. The “accumulated depreciation” figure is the amount that those assets have depreciated year-to-date.
- The last two lines of the top section are labeled “required cash reserve,” which is the amount in reserve for emergencies and “available cash balance,” which is the money used for day-to-date operations as collected via the Annual Agreement. Both accounts constitute the money on hand at FHC, but do not include any locally held accounts. If your available cash balance is in the negative at any given time, you are essentially using your reserves to operate.
- If the house corporation has set-aside funds, those will be the last line on the top section.
- If the house corporation has any loans, those will be in the bottom section under “liabilities.” The current balance of a loan will be listed each month. The Fund Balance is the total worth of the house corporation. It is the total assets minus the total liabilities.

### **Revenue and Expense**

- This report shows where the house corporation is in relation to its budget, based on the previous month end.
- There are five columns on this report:
  - The first column is your month to date income or expense. This is just what was collected or spent in the month the report is being sent.

- The second column from the left to right is the year-to-date actual amount. That is the accumulative amount that has been collected or spent since July 1.
- The third column from left is the current approved annual budget.
- The fourth column from left is the percentage that has been collected or spent year-to-date in relation to that budget. For example, in December, the house corporation should be at roughly 50% of certain budget items like cleaning, maintenance or rent. There are specific expenses like insurance that hit at one time in the year, but most things should follow a percentage each month. A house corporation should be monitoring this column to see if any red flags stand out in relation to over or underspending.
- The fifth column is the amount left in the budget based on the amount collected or spent year to date.

### General Ledger

- This report shows in detail every transaction for the house corporation in numerical account order for the fiscal year-to-date. It is beneficial to keep for historic purposes and for budgeting. It encompasses all the items on the Revenue and Expense report and the Balance Sheet – which vendors were paid, in which month did the chapter pay the house corporation, which loan payments were made, etc.
- This report always begins with the beginning balance from the month before, then lists the current month's activity and finally gives an ending balance (*e.g., account 6620 notes the total paid for cleaning was \$540 at beginning of month. The total activity for the month was a cleaning bill from Molly Maids for \$65. The ending balance for the month was \$605.*)

### Fixed Asset Listing

- This report is sent to house corporations every October. It lists all assets (new items over \$500) as of the date of the report. It shows when the assets were purchased, the vendor, the price and how much each asset has depreciated year-to-date.
- The house corporation is responsible for informing OOH when assets are no longer held so they can be removed from the balance sheet and depreciation is no longer factored. Assets affect personal property taxes, so this ensures the house corporation is not paying for items they no longer have. It is also a great historical tool to assist officers during transitions.
  - Depreciation is a number for reporting purposes only. Whenever a fixed asset is purchased, it is expensed over a period of years (3, 5, 7, 10 or 20 years), instead of a lump sum. Assets, such as your house, are loaded at the purchase price, not the current market value. This account is not budgeted as a cash expense, although depreciation is a calculation required by the IRS.

## Fixed Assets - How to Dispose of Fixed Assets

- The Office of Housing will send the house corporation a fixed asset list periodically or it can be requested from your Account Payable Specialist at any time.
  - Fixed Assets are reported on the Balance Sheet of the Financial Statements and used for various financial reporting, therefore, the fixed asset list must be reviewed for accuracy.
  - Fixed assets are items purchased for long-term use (more than a year), cost more than \$500, and can include items such as buildings, land, furniture, computers, etc. Because of the \$500 dollar threshold, the fixed asset report is not the same as an inventory report. If an item meets this criteria and is omitted from the report, please contact your APS.
- Review the fixed asset list and do a physical inventory of the items.
  - Report any items no longer in possession to your APS. Include the asset ID, description, date the asset was taken out of service, how it was disposed (donated, sold, thrown away), and amount of proceeds from sale. Sale proceeds should be forwarded and made payable to Delta Gamma Fraternity Housing Corporation, 3220 Riverside Drive A2, Columbus, Ohio 43221. Note the house corporation, asset ID, and date of sale in the memo line.

## ACCOUNTS PAYABLE

Our Accounts Payable (AP) team consists of four accounts payable specialists (APS) and one accounts payable administrative specialist, who process approximately 900 checks/EFTs each month for our clients. You can reach your OOH APS by utilizing our standard emails formatted as fhcpayables#@deltagamma.org (e.g. for Region 1, [fhcpayables1@deltagamma.org](mailto:fhcpayables1@deltagamma.org)). To call your APS, dial 614-487-5599 and ask for assistance.

## General Communication Tips

1. Always include your name, title and chapter on all communications with the AP team.
2. All mailing/billing addresses should include the house corporation name and FHC address. Please make sure your vendors and volunteers are aware of this recommendation. The shipping/location address should be your house address if applicable. An account should never be in an individual house corporation volunteer or staff member's name for liability and warranty reasons and should not include an AP staff member's name.
3. Please use the following format when setting up HC vendor accounts or mailing anything to us.

\_\_\_\_\_House Corporation of Delta Gamma Fraternity  
Attn: FHC, Region \_\_\_\_\_  
3220 Riverside Drive Suite A-2  
Columbus, OH 43221

4. All payments to vendors should be made by the FHC office, especially for services and large purchases. This allows tracking of expenses, the ability to provide accurate vendor reporting and allows us to attach items to the vendor file for future inquiries.

## HOUSE CORPORATION VS. CHAPTER OBLIGATION

The easiest way to determine if your expense should be paid by the house corporation or by the chapter is to view the relationship as one of landlord and tenant. The house corporation is the landlord of a furnished home and the chapter is the tenant.

| chapter pays  | house corporation pays   |
|---|--|
| Consumables/Disposables (e.g., lightbulbs, cleaning supplies, paper products) | Purchased permanent items (e.g., furniture, appliances, décor) |
| Food (not contracted by house corporation)                                    | Catering (contracted)  |
| Utilities (all year)  | Landscaping/snow removal                                       |
| Extra usage on leased equipment   | Cleaning company   |
| Negligent damages to house corporation items                                  | Construction, repair and renovations                           |
|   | House/property/space upkeep                                    |

Since each chapter is individual, there may be exceptions to the above. If you are unsure, please contact FHC before the invoice is paid. If the collegiate chapter receives any questionable invoices, they have been instructed to contact the house corporation for clarification.

## PAYING VENDORS

To ensure accurate and timely processing of your emailed payment requests, please include the following:

1. *Email subject line*: chapter name, fund/region (xxx/x) name of vendor or subject.
  - a. You can obtain your 3-digit fund and region number from anyone on the AP team.
2. *Attachments*: invoices, reimbursement request form, receipts or proof of expense/payment, signed contract, IRS form W-9, certificate of insurance (COI) and any other documents related to the request. All attachments should be in .pdf format.
3. *Email body*: description of request and its purpose (e.g., "Please pay deposit on attached contract for cleaning services.")
4. *Signature*: your name and title are required.

## PAYMENT REQUESTS

Following the below suggestions will not only expedite transactions for your house corporation but will also ensure accuracy when processing payments.

### Reimbursements for out-of-pocket expenses

- Please complete the required [reimbursement request form](#).
- The requester should send the reimbursement request form and invoices/receipts/proof-of-purchase as .pdf or .doc attachments. Pictures will be accepted only if they are legible when printed. Please do not imbed documents into the body of the email.
- Large purchases or services should not be paid with personal funds. If you must pay service vendors in an emergency, please make sure proof of insurance and a W-9 form is collected, unless already on file.
- FHC will seek house corporation approval for ALL reimbursement requests automatically.

### Invoices

- All invoices from the house corporation, house director or vendor should be emailed to the APS for faster receipt. Please encourage vendors to email their invoices.
  - Invoices within the body of an email can be accepted if all information in the email mirrors an invoice (name, address, contact, invoice number, invoice date, due date, total due, description).
- If the house corporation or house director mail an invoice via USPS, please mark approval to pay.
- If a vendor sends an invoice directly to FHC, the APS will automatically seek approval to pay or pay with pre-approval from the house corporation, which will be held on file for reference.

### Local Accounts

- Supporting documentation is needed for all local bank account transactions, and invoices and copies of deposits should be included.
- Please remit supporting documentation to your APS email address at the end of each month.

## PAYMENT PROCEDURES

### Standard Processing Procedure

- Weekly Schedule and Payments
  - All requests should be submitted by midnight on the Sunday prior to when payment should be remitted.
  - Payments are issued weekly, with checks mailed by Friday of each week. All payments are made by the due date if the invoice is received

on time. OOH does not guarantee delivery date of mailed checks. Exceptions to standard procedure are listed below.

- The bank guarantees EFT payments to be in the account no later than the end of the second business day after the date of processing, meaning they should be received in the account by Friday of that week.
- Please feel free to contact your APS for status of payment, EFT application or any of the required forms you need.

### **Expedited Processing Procedure**

- Process for submitting an expedited request
  - Completed payment request must be received no later than 2 p.m. EST/EDT. The email should be marked high importance and clearly state the desired method for delivering payment (two-day, overnight, etc.) and the intended party.
  - Call your APS to let them know you have submitted an expedited request.
  - The house corporation is responsible for any shipping charges to overnight the payment if they are not an EFT vendor. A \$50 fee will be charged to the house corporation but may be waived in certain circumstances.

### **Exceptions to Regular Procedure**

- Bank Holidays
  - Direct deposits will be delayed by at least one working business day to account for bank holidays.
- Executive Offices closures or system malfunctions
  - While rare, it is sometimes necessary to close EO due to severe weather or system failures beyond our control. If possible, there will be a message on the phone system.
  - For scheduled closures for holidays, house corporation officers will be notified of the amended deadlines well in advance. The house corporation is responsible for providing this information to their house director and vendors. If possible, reminders will be included in communication.
- Discrepancies
  - Some payment requests require further information due to discrepancies. Even if the invoice was received on time, payment may be delayed until additional information can be obtained.

Adhering to these schedules allows processes to be timely and accurate. Please send your APS an email if you have questions or concerns.

### **1099 PROCESSING**

Each January, all vendors paid \$600 or greater for the previous year will be sent a FORM 1099-MISC, per IRS requirements. Purchases are typically not a taxable item

unless paid to a service vendor and/or installation is involved. Should there be a question on a specific vendor, please call OOH.

All vendors must have a completed W-9 form on file before first payment can be remitted. No vendor should be paid until they submit this form. If proper documentation is not received ahead of time, FHC will attempt to obtain this information on the house corporation's behalf, but payment may be delayed. It is recommended to obtain the form before first payment request is submitted.

W-9 requests and 1099 reporting are required by the IRS. FHC requests that the house corporation and chapter house occupants follow the above guidelines to remain in compliance with the law for your protection.

## **GUIDELINES FOR SERVICE VENDORS**

The following information should be obtained prior to acquiring a vendor's services:

1. Full name and business name
2. Mailing address
3. All relevant contact information (office/cell numbers, email address)
4. Written contract or proposal with warranty or guarantees
5. Proof of insurance, Certificate of Liability Insurance – *see below*
6. A completed and signed form W-9

Though obtaining this information may possibly delay getting a project completed, it is imperative to provide it before the work is done and payment is released.

## **INSURANCE INFORMATION**

All vendors doing work at the property, internally or externally, should provide proof of insurance. The Certificate of Liability Insurance (COI) can be obtained through their insurance carrier.

While a COI is preferred, it is possible vendors are unable or unwilling to obtain documentation of insurance. In this case, the house corporation board would approve an uninsured vendor's use, and the vendor would complete, sign and notarize an insurance waiver. This method does not provide much protection to the house corporation, so it should be a last resort.

This paperwork can be emailed to FHC with the invoice and/or contract and will be kept on file, should an insurance issue arise.

- House Corporation/Officer Expenses
  - Reference to Direct Deposit Set-Up in FORMS
  - Reference to Expense Report for Reimbursement from Personal Cost in FORMS
- Working with service vendors (conference curriculum)
- Asset Listing (conference curriculum)

## ACCOUNTS RECEIVABLE

Our accounts receivable department bills based on the figures in the Annual Agreement and collects funds from the collegiate chapter on behalf of your house corporation.

OOH bills at the beginning of each month through Anchorbase based on the schedule in the Annual Agreement. Payments are due by the 10<sup>th</sup> day of the month. The Annual Agreement is the document, based on your house corporation's budget, signed in Anchorbase each spring by the vp: finance, Regional Finance Specialist (RFS) and house corporation treasurer. All finance and billing information is in Anchorbase in the Finance section under the Chapter Management tab or on the Dashboard page in the Finance Content Block.

Payments to OOH are generated as an ACH (Automated Clearing House Network) payment. Each collegiate chapter's vp: finance signs a Consumer Authorization for Direct Payment via ACH form, which permits OOH to have funds from the chapter's checking account electronically transferred to OOH for payment of the billing. These funds are transferred between the 10<sup>th</sup> day and the 15<sup>th</sup> day of the month, applied to the billing and deposited into your house corporation account.

If the collegiate chapter has insufficient funds in their checking account and the ACH was unsuccessful, the chapter will appear on the delinquent report spreadsheet (DRS). The DRS is sent to Council and the regional teams every week, and the chapter will remain on the DRS until the billing is paid in full.

If the chapter does not meet their financial obligations and maintains past due billings at the end of the year, a promissory note is created. The promissory note is a schedule outlining how the chapter will pay off the debt in the coming fiscal year. The house corporation will work with the RFS and RHS to create this document, and OOH will collect this money based on the schedule created. Each past-due billing will remain open until paid in full.

The chapter budget will not be approved unless it matches the Annual Agreement. It is essential that house corporation meet with the chapter to discuss the budget, any fee changes and the plans for the coming year to ensure proper communication and collaboration.

## LOCAL ACCOUNTS

It is highly recommended that a house corporation does not have a local account due to liability. The FHC credit card program is the preferable program. FHC's insurance policy that covers fraud and embezzlement is based on all expenses recorded, which acts as a third party for accountability.

If a house corporation is required to have a local account due to any local bank loans, the account should not have ATM or debit card capabilities. In this case, FHC will send the monthly loan payment directly to the bank to be withdrawn. Due to underwriting stipulations, any local account used by volunteers to write checks will

have a \$100,000 deductible applied versus a \$5,000 normal deductible for funds held at FHC.

If a house corporation has a local account, it is important that all transactions are recorded accurately on the financials. The following guidelines apply:

1. Bank statements mailed to:  
3220 Riverside Drive Suite A2  
Columbus, Ohio 43221
2. Request bank statement should include check imaging.
3. The bank offers free checking accounts for non-profit organizations.
4. Balance of \$250 to \$500 is recommended.
5. When term ends, bank must be contacted to update account signers, email and other information. Otherwise, accounts could go inactive and funds get escheated to the state.
6. Set up online banking to track activity, retrieve statements and eliminate mailed statements.
  - a. Do not share login information.
  - b. Create a separate user for FHC with view-only access to retrieve monthly bank statements.
  - c. Deactivate user accounts when term ends.
7. Supporting documentation is required for all local bank account transactions. Please email supporting documentation to [FHCPayables#@deltagamma.org](mailto:FHCPayables#@deltagamma.org) at the end of each month.
  - a. *Deposits*: FHC needs copies of checks deposited. Make a copy of checks before depositing with the bank.
  - b. *Written Checks/Purchases*: FHC needs copies of supporting documentation (receipt, invoice, donation letter, W-9 or anything else that explains specifically how the money was spent). Write check number on supporting documentation.
  - c. *Documents*: Maintain copies of all supporting documentation emailed to FHC for house corporation records.

*Vendors should be paid by FHC's accounts payable department, not through the local bank account.* However, if payment must be issued from a local bank account, the vendor must complete a W-9 form before payment is issued, which should be included with supporting documentation.

Transfers up to \$1,000 may be requested from FHC funds to the local bank account. Transfers over \$1,000 are required to include documentation that support purpose of use.

## **BUDGET OVERVIEW**

The proposed budget considers the culmination of the previous fiscal year and the trends halfway through the current fiscal year.

The fiscal year for all Delta Gamma chapters and house corporations is July 1 – June 30. Each year, the house corporation approves a capital budget and an operating budget. For the 2021-2022 fiscal year, the capital budget will be due November 1 and the operating budget is due February 1. To learn more on this process, please review the information on budgets in the *Processes* section.

## **TREASURER ANNUAL CALENDAR**

### **July**

This is the start of the fiscal year. You will need to have your approved house corporation budget for the new fiscal year and be sure you are receiving the monthly financials. Contact [FHCReports@deltagamma.org](mailto:FHCReports@deltagamma.org) if you have any questions.

### **August**

Summer projects are being completed prior to the start of the academic year and the house opening. Monitor your capital budget to make sure all work is within budget parameters. Work with vendors and send all payment requests and invoices to your accounts payable specialist. The email address is FHC Payables and the number of your region @deltagamma.org. (Ex. FHC Payables4@deltagamma.org)

### **September**

Meet with the chapter and introduce the house corporation officers. Explain the budget and share all the projects and purchases that were made over the summer. Discuss the chapter wish list which is due in October.

### **October**

The chapter wish list is due October 1st. This is so it can be incorporated into the Capital Budget.

The Annual Meeting notice is due by October 15th. This meeting must be shared with all living initiated members of your house corporation. The least expensive way to do this is to put it in the Anchora. Information will be sent from the Office of Housing.

### **November**

The Capital Budget is due to the Office of Housing November 1st. It will be incorporated into your proposed budget for next year. Please make sure to have actual quotes from vendors when completing this budget and consider the chapter wish list.

## December

Proposed budgets for the new fiscal year will go out December 15th. A meeting of the house corporation to go review the budget and approve a final one will need to be scheduled for the first two weeks of January. For questions regarding your budget, contact Mandy Reymann at [mandyr@deltagamma.org](mailto:mandyr@deltagamma.org).

## January

Final approved annual house corporation budgets are due to the Office of Housing by January 15th. This includes a presentation to the entire voting board and the meeting and approval recorded in your minutes.

## February

The Annual Agreement which is created once you have an approved house corporation budget, needs to be approved by yourself as well as the RFS and vp: finance by February 15th. It is approved in Anchorbase. For questions, please contact [FHCReports@deltagamma.org](mailto:FHCReports@deltagamma.org).

## January – March

The Annual Meeting needs to be held sometime in the second semester or winter term. If the house corporation is buying or selling property or taking out a loan, they will need to take a vote on these items at the Annual Meeting vs. a regular board meeting. The bylaws specify these actions require a vote of the entire membership. Please refer to October for Annual Meeting notices.

## April – June

As the academic year is coming to a close, summer projects should be reviewed. A walk through of the house to ascertain any maintenance items needed should be completed. June 30th is the close of the fiscal year. Be sure to turn in all reimbursement requests, receipts and invoices for this fiscal year to your accounts payable specialist by the due date.

- The Annual Report is completed by the president and secretary, however the president may ask some financial questions. Please be prepared to answer any and all questions the president may ask.

## Secretary

Position description can be found in the [Fraternity & Foundation Volunteer Position Description Handbook](#).

If the house corporation does not have a secretary, the duties of this position will fall under the house corporation president, unless she assigns them otherwise.

## RECORD KEEPING

### Minutes and Corporate Records

- It is the responsibility of the secretary to take minutes during meetings.
- House corporations with housing hold at least four regular meetings during each fiscal year and house corporations with no housing hold at least two regular meetings, with the chapter president, vp: finance, director of house management and ATC in attendance. House corporations also hold an annual meeting of the house corporation membership on or around the collegiate chapter's Founders Day.
- Minutes should include the following:
  - Name of the house corporation
  - List of those in attendance and their titles
  - List of all those not in attendance and their titles
  - A snapshot of the meeting and important takeaways, focusing on fact
- Minutes must include the following:
  - Type of meeting
  - Date and time meeting began and adjourned
  - Record of the results of any elections
  - Motions made and if they passed
- After each meeting, minutes should be uploaded to Anchorbase so the business conducted can be communicated with OOH and the Regional team.
  - To upload minutes, go to the Housing tab in Anchorbase and select the Meeting Minutes task.

### Annual Meeting

- All house corporations should schedule their house corporation Annual Meeting on or around the collegiate chapter's Founders Day. If this is not possible, the meeting should be in the spring semester/quarter to ensure the entire collegiate chapter membership is able to attend.
- Notification of the Annual Meeting is required to be sent to all members of the house corporation and is typically done by placing an ad in the *ANCHORA*.
  - This announcement is submitted via a task in Anchorbase and is due by October 15. There is a \$50 fee associated with publication.
- The annual meeting agenda is part of the standing rules found in the bylaws. The bylaws should contain specific instructions or rules governing the annual meeting.

## SAMPLE RECORDS

### Sample Annual Meeting Agenda

1. Appointment of committee to approve Annual Meeting minutes
2. Reading of the minutes of the previous Annual Meeting and report of committee attesting to correctness

3. Treasurer's report
4. Reading of Annual Reports
5. Unfinished business
6. New business
7. Election of house corporation directors
8. Vote to approve new or revised bylaws, which have been reviewed and approved by the RHS
9. Vote to approve sale or placement of a lien against existing chapter facilities or purchase of new facilities
10. Adjournment

[View the Sample Annual Meeting Agenda.](#)

### **Update Officer Roster**

- Immediately following elections, complete the House Corporation Officers task in Anchorbase under the Housing tab and enter the start and end date for the officers. This means you do not have to wait until the officer assumes her role and will allow the Fraternity and OOH to start onboarding the newly elected officers before their start date.

## **Employment Committee Chairman (ECC)**

Position description can be found in the [Fraternity & Foundation Volunteer Position Description Handbook](#).

### **EMPLOYEE MANAGEMENT SERVICE (EMS) DESCRIPTION**

The role of a Delta Gamma employment committee member can be very time consuming and uncomfortable depending on your professional background. Finding talent is one thing; retaining and developing employees is another. In this ever-changing, litigious climate, employment committee members need experience to encourage a strong, independent, and team-focused work atmosphere and to avoid legal repercussions. The employee management service may be an option, which includes training on the following:

- How to produce and conduct employee training on your house, safety, technology, chapter risk management policies and working with vendors
- Performance reviews, disciplinary action and coaching
- Terminations
- Negotiation of employment agreements and renewals
- Proposal of wage increases
- Interviewing potential employees (with employment committee feedback)
- Consultation on complex employee issues of all types

For more information about EMS, contact your HR Business Partner at the Office of Housing.

## EMPLOYMENT COMMITTEE RESPONSIBILITY

The employment committee is responsible for maintaining the workplace free of harassment and intimidation. The employers' responsibilities include, but are not limited to, the following:

- Discussing this policy with the employees and assuring that employees are aware that they can work in an environment free of harassment.
- Assuring the employees that they are not required to endure degrading, denigrating, abusive or hostile treatment because of their race, color, religion, national origin, disability, sex, age or veteran status.
- Informing the employees of the complaint process, including the employees' right to bypass an offending supervisor.
- Immediately reporting any complaints concerning workplace harassment received from employees to the employment committee.

## WORKERS' COMPENSATION

All states in the United States require that employers purchase workers' compensation insurance. The workers' compensation laws make an employer responsible for medical, indemnity and/or death benefits for subject employees who are injured or killed while performing services for the employer. These laws then serve to relieve employers of liability from common-law suits involving negligence.

- Depending on the state, the insurance can be purchased either through the state fund or the competitive market.
  - In monopolistic states (MT, ND, OH and WA), the employer is obligated to go to the state fund to purchase insurance.
  - In all other states, known as competitive market states, the employer can access this market through an insurance agent/broker.

## PROCESS FOR EMPLOYEES INJURED ON THE JOB

If an employee is injured while working, the following steps must be followed:

1. Determine if they need immediate medical attention. If it is an emergency, send the employee to the nearest health center, hospital or urgent care facility.
2. Notify the medical facility the employee is covered under worker's compensation.
3. Once the employee has been sent to the medical facility, please file a First Report of Injury (FROI). Many of the chapter houses are covered by MJ Insurance, Inc. Our policy number is **C2055452355**. FROI forms should be sent to Heather Cox at MJ Insurance, Inc. as well as your Human Resources Business Partner.
  - a. If you do not utilize MJ Insurance, Inc., please contact your state's workers' compensation office.

## PAYROLL

If the house corporation has employees, it should have an employment committee. All members of the employment committee work on budget figures for payroll. FHC

will provide the current amounts paid each month on your reports for payroll, payroll taxes, payroll charges and workers' compensation.

All required new hire paperwork must be completed prior to or on the employee's start date and is completed electronically through the payroll system. Your Human Resources Business Partner will notify the house director when all new hire forms have been completed so the new employee can begin working/training. This process ensures everything is on file to process their first payroll.

All employees will enter their working time in the payroll system. The house director will monitor working hours for all employees each week. At the end of the two-week pay period, the house director will approve timesheets and the Human Resources Business Partner will process the payroll.

All employees are required to use direct deposit and must submit all pertinent bank information in a timely manner to activate the direct deposit system. In states where the direct deposit mandate is not permitted, and the employee chooses not to use this method, the house corporation may be responsible for any UPS charges to mail live checks.

The pre-employment checklist needs to be completed by the employment committee chair for all employees other than kitchen assistants. This checklist lists the employees' name, pay rate, benefits, position and exempt/non-exempt status. Upon receipt, the Human Resources Business Partner will create an employment agreement or letter for employees and send the necessary employment forms electronically. The checklist should be completed for each employee prior to their start date. If the employee is returning for the next academic year, the checklist is due no later than May 1 to your FHC Human Resources Business Partner.

### **MINIMUM WAGE AND FLSA**

Covered non-exempt workers, or hourly staff, are entitled to a minimum wage of not less than \$7.25 per hour, effective July 24, 2009. Many states have a minimum wage that is higher than the federal minimum wage. Check your state law, or consult your Human Resources Business Partner, to determine applicable minimum wages. Wages required by FLSA are due on the regular payday for the pay period covered, which means you cannot extend the wages of a non-exempt worker past the pay period in which the hours were worked (e.g., paying wages earned in a nine-month period over 12 months).

### **PAYROLL PERIODS**

Employees are paid on a biweekly cycle. Payroll periods always run Monday-Sunday. The biweekly schedule shows the submission date, payroll periods and pay date. The Human Resources Business Partner will email the payroll schedule by the end of June each year to the house director. Payroll must be approved/submitted on the scheduled payroll processing date by 12 p.m. Eastern for Eastern, Central and Mountain time zones or 2 p.m. Eastern for the Pacific time zone. Employees are paid every other Thursday. Notification of any changes must be submitted in writing to your Human Resources Business Partner by the Friday prior to the Thursday payroll

date. Employees can make some changes in the payroll system, which will notify your Human Resources Business Partner to approve them in the payroll system.

## **HOURS OF WORK**

House corporation employees have varied work hours depending on their position. The workweek begins Monday at 12:01 a.m. and ends Sunday at midnight. The employee is expected to report to work on time and remain on the job throughout their scheduled shift. The house director and/or the employment committee must approve any deviations from the stated workday.

## **WORKING TIME RECORDS**

The employer is responsible for keeping and reporting an accurate record of the hours the employee works. If the employee is classified as a non-exempt employee, the employee must reflect actual hours the employee worked each day. If the employee is classified as an exempt employee, the employee must report hours not worked (e.g., vacation or sick time). Failure to keep accurate time records will result in discipline. Falsification of time records by any method will result in discharge. The house director must review/approve their payroll no later than Monday 12 p.m. Eastern for those in Eastern, Central and Mountain time zones or 2 p.m. Eastern for those in the Pacific time zone.

## **OVERTIME**

The employment committee will make reasonable efforts to avoid requiring overtime and to schedule overtime with as much notice as possible. Occasionally, work beyond normal business hours is necessary and unavoidable. If the employment committee notifies the employee that they must work overtime, failure to work mandatory overtime may result in discipline. A non-exempt employee required to work overtime will be paid 1 ½ times the regular rate of pay for each hour over 40 hours in a workweek.

- *Note:* Some states have more stringent definitions for overtime than that specified by federal law (e.g., California is entitled to overtime compensation for any hours over eight worked on any one workday, even if the employee does not work 40 hours during the week).

The employee is not permitted to work overtime without the express, prior approval of a supervisor with appropriate authority. Working overtime without approval will result in disciplinary action. The employment committee has the responsibility to minimize overtime by monitoring and maintaining appropriate workloads and staffing levels.

## **DIRECT DEPOSIT**

OOH requires direct deposit for payroll checks of all house corporation employees, unless otherwise mandated by state law. The convenience of direct deposit ensures that the employee receives the employer payroll on a timely basis without a trip to the bank. Employees can enroll in direct deposit as a new employee by entering their banking information into the payroll system. If current employees wish to

change their banking information, they can update the information in the payroll system. All new bank accounts are required to be prenoted.

## **ORIENTATION AND TRAINING**

The employment committee's commitment does not expire once employment agreements have been signed and filed. New employees should be welcomed by the entire house corporation. Training should include a thorough walk-through of the house, security system training, review of policies and procedures/bylaws related to duties, vendor information, house corporation expectations and safety guidelines/workers compensation training. The house director should also have opportunities for professional development. The house director is required to attend the House Director Conference every year.

All new employees should be introduced to the chapter – especially the women living in the house. This can be done at a house or chapter meeting close to the new employee's start date. Contact information for the employment committee, the house corporation president and the ATC should be posted in the house for access by all employees.

The employment committee should check in periodically with employees to touch base and address any outstanding issues. Issues should be addressed immediately and never held until an employee's performance review, though any unresolved or ongoing issues should be included in the performance review.

## **EMPLOYMENT POLICIES**

### **Attendance**

- Delta Gamma expects each employee to show up, on time, for work each scheduled day. An employee could be disciplined or discharged for excessive absenteeism or tardiness. Please see the state-specific employee handbook for more information.

### **Resolution of Disputes**

- Delta Gamma encourages an open line of communication to avoid misunderstandings between individual employees and management. The procedures outlined below are intended to establish an informal process to keep this channel of communication open between the employee and the employee's supervisor. This procedure is not intended to mitigate the responsibility of the employee and the employment committee to work out differences together.
  1. If a difference arises, the employee and the employment committee must make a reasonable effort to settle the difference informally and amicably. The employee and the employment committee are expected to contribute to a just and equitable resolution of the difference. House corporations on EMS should consult with their Human Resources Business Partner.

2. If the employee is still dissatisfied after the employee and the employment committee have made a reasonable effort to settle the difference, the employee may inform the employment committee that the employee would like to discuss the meeting with the president of the house corporation board. The employment committee will arrange for a meeting with the president of the house corporation board to arrive at a final resolution. House corporations on EMS should consult with their Human Resources Business Partner.

### Family and Medical Leave

- The Family and Medical Leave Act (FMLA) does not apply to Delta Gamma house corporations due to the number of employees. FMLA applies to employers employing 50 or more employees in a 75-mile radius.

### Military Leave

- Delta Gamma complies with all federal and state laws for the protection of employment rights of those persons serving in the Uniformed Services. Delta Gamma prohibits discrimination against the employee because the employee belongs to, has served in or is applying to join a uniformed service or because the employee has exercised the employer statutorily protected military leave rights.
  - The employee must notify the house director and the house corporation as soon as the employee knows of the likely date of the beginning of military activity that might require leave. Notice must be received no less than five (5) days before the leave is to begin, unless military necessity prevents such notice, or it would otherwise be impossible or unreasonable. The employee must provide a copy of the military orders to the house director/employment committee no later than 24 hours after the employee receives them.
- Benefits During Military Leave
  - If the employee is on active duty and unable to use the employer annual leave due to Military Leave, the employee may request to be paid accrued, unused annual leave time during the next pay period.
- Return from Military Leave
  - When the employee returns from military leave, the employee will be restored from military leave to the employer job, consistent with and subject to the exceptions contained in the Uniformed Service Employment and Reemployment Rights Act (USERRA).
  - Military leave generally extends up to five (5) years. Military leave may be extended under certain circumstances and there are certain types of service that do not count toward the five-year limit.
  - If the employee is on military leave for 30 days or less, the employee must report back to work on the first regularly scheduled shift after the end of their military service, allowing reasonable travel time. If the employee leave extends more than 30 days, the employee must apply

for reinstatement in accordance with USERRA and all applicable state laws. To apply for reinstatement, the employee must contact the house director/house corporation.

- If the employee's military leave extends more than 30 days, the employee must submit documentation showing that:
  - The application for reemployment is timely.
  - The employee has not exceeded the five-year limit.
  - The employer separation or discharge from service does not disqualify the employee from re-employment rights.
- Upon return from Military Leave, the employee will be placed in the position the employee would have attained had the employee remained continuously employed or an in comparable position, depending on the length of military service in accordance with USERRA. The employee will be treated as though the employee were continuously employed for purposes of determining benefits based on length of service.

### **Jury Duty**

- If the employee is summoned to Jury Duty, the employee must provide the jury summons to the house director/ECC immediately and no more than one business day after the employee receives it.
- If the employee is released from jury duty for any one-half day or more, the employee must report to work or immediately notify the house director that the employee cannot report to work and the reason.
- Employees on jury duty will be paid for their jury duty service in accordance with state law. Exempt employees will be paid their full salary for any week in which time is missed due to jury duty if work is performed for Delta Gamma during such week unless the employee is released for a half-day or more and fails to report to work.

### **Subpoenaed Witness**

- If an employee is subpoenaed as a witness or interested party, the employee must be allowed the necessary time off to appear in court.

## Occupational Health Centers

- Occupational health centers or clinics (OHC) are specifically designed to assist employers and employees in dealing with on-the-job illnesses and injuries. The employment committee should determine if an OHC is located near the campus. If so, consider using this facility for all employer's workers' compensation needs.
  - The employment committee may want to contact the university's human resource office to determine where they send employees who are injured on the job.

## Unemployment Compensation

- Employees are covered by state unemployment compensation laws of the state where the house corporation is incorporated. Unemployment compensation laws provide unemployment insurance (benefits) for employees who are involuntarily separated from their jobs. The State Department of Industrial Relations determines the former employee's eligibility for benefits under the program. The employment committee should check with their local and state Labor Divisions regarding unemployment issues because the laws vary from state to state. Some states have determined that unemployment benefits will not be paid to workers associated with academic institutions or temporary layoffs (summer months).
- The house director should clearly document why an employee was involuntarily separated from their position on the employee separation form as well as any disciplinary forms/discussions. The unemployment compensation determination will be based on the reason(s) the employee was terminated and documentation provided.

## At-Will

- Delta Gamma expects employees to work cooperatively toward meeting the goals of the Fraternity. Sometimes, employment relationships do not work out for the mutual benefit of the employer and the employee, which highlights the importance that both the employee and Delta Gamma have the ability to end the employment relationship if either party believes the situation is not working out to the benefit of the employee or Delta Gamma (per state guidelines).
- Either the employee or Delta Gamma may terminate an employment agreement at any time, for any reason, with or without notice.
  - It is strongly recommended the house director and employment committee chair contact their Human Resources Business Partner regarding documentation prior to terminating an employee.
  - Delta Gamma does not offer "lifetime" or "until retirement" employment for any employee.

## Discrimination

- Delta Gamma Fraternity is committed to equal employment opportunity. Delta Gamma will not discriminate against employees or applicants for employment on any legally-recognized basis ["protected class"] including, but not limited to: veteran status, uniform service member status, race, color, religion, sex, national origin, age, military status, genetic information, disability and/or any other protected class under federal, state or local law. We will not tolerate harassment of employees by anyone, including supervisors, coworkers, vendors or students. Workplace and sexual harassment violate Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act and/or the Americans with Disabilities Act. Any employee who engages in workplace or sexual harassment violates this policy and the law.

## HARASSMENT DEFINED

Workplace harassment is verbal or physical conduct that denigrates or shows hostility or aversion toward an individual because of their race, color, religion, national origin, disability, sex, age and/or veteran status, when it:

- Has the purpose or effect of creating an intimidating, hostile, or offensive working and/or educational environment; or
- Has the purpose or effect of unreasonably interfering with an individual's work and/or academic performance; or
- Otherwise adversely affects an individual's employment and/or academic opportunities.

Workplace harassment includes, but is not limited to the following:

- Epithets, slurs, negative stereotyping, or threatening, intimidating, or hostile acts that relate to race, color, religion, national origin, disability, sex, age and/or veteran status
- Written or graphic material that denigrates or shows hostility toward an individual or group because of race, color, religion, national origin, disability, sex, age or veteran status, and that is placed on walls, bulletin boards or elsewhere on Delta Gamma premises, or circulated in the workplace. This also includes acts that purport to be or is meant to be "jokes" or "pranks," but is hostile or demeaning, such as hate mail, threats, cartoons defacing photographs or other such material or conduct.
- Submission to the conduct is an explicit or implicit term or condition of employment or continued employment
- Submission to or rejection of the conduct is used as a basis for employment decisions affecting an employee, such as promotion, demotion or evaluation
- The conduct has the purpose or effect of unreasonably interfering with an employee's work performance or creating an intimidating, hostile or offensive work environment

Sexual harassment is a form of workplace harassment, defined as unwelcome sexual advances, requests for sexual favors and any other physical, verbal conduct of a sexual nature. Sexual harassment includes, but is not limited to the following:

- Unwelcome sexual propositions
- Sexual innuendo
- Suggestive remarks
- Vulgar or sexually explicit comments, gestures or conduct
- Sexually oriented kidding, teasing or practical jokes
- Physical contact, such as touching another's body, pinching or patting

## Background Checks

- All new employees are required to complete the background process, which includes a thorough background check and social security number verification. All forms are completed electronically through our background check vendor. Unsupervised vendors, defined as a vendor who has access to the house (key fob or door code) without house director supervision, are also required to complete a background check, but not social security verification.

## EMPLOYMENT COMMITTEE RESPONSIBILITY

The employment committee is responsible for maintaining a harassment- and intimidation-free workplace. In this role, the employer responsibilities include, but are not limited to, the following:

- Discuss this policy with the employees and assure that all of them are aware that they can work in an environment free of harassment
- Assure the employees that they are not required to endure degrading, denigrating, abusive or hostile treatment because of their race, color, religion, national origin, disability, sex, age or veteran status
- Inform the employees of the complaint process, including the employees' right to bypass an offending supervisor
- Immediately report any complaints concerning workplace harassment received from employees to the employment committee

## FEDERAL AND STATE POSTING REQUIREMENTS

Some of the laws administered by the Department of Labor (DOL) require that employers post certain notices in their workplaces to ensure their employees have access to information about their rights. DOL provides all required posters free of charge. Posters may be downloaded [here](#).

Laminated posters are also available from several companies. The Federal-Easy-Post poster may be purchased from [Poster Guard](#).

Posting requirements vary by law. Not all employers are covered by each of DOL's laws, thus not all employers may have to post a specific notice.

- Requirements depend on factors such as nature and location of business, number of employees, annual dollar volume and whether the organization has federal employment agreements or sub-employment agreements.
- *Note:* Some states have workplace poster requirements that employers must follow in addition to the federal requirements. DOL does not provide guidance on state poster requirements.

## WORKING WITH THE HOUSE DIRECTOR

Establishing a solid foundation with the house director is essential, per the following recommendations:

- Meet the house director at the house on her first day to set the tone for your relationship.
  - If there is a new employee that is not the house director, the house director may work as a liaison in this capacity (e.g., if a new chef is hired, the house director should be meeting them at the house on their first day).
- Introduce the house director to the chapter president and director of house management, as they will work closely with both positions. Encouraging this relationship is essential.
- Review any written resources or expectations for this position. The house director should be shown the House Director Handbook and there should be a conversation regarding the expectations for this role, as set by the house corporation. These expectations need to be clearly communicated to hold employees accountable.
- Communicate often with the house director and establish an ideal timeline that the house corporation would like to receive information from the house director (e.g., a weekly report).
- Ensure that the house director has all the proper equipment, in working order, needed for their job.

## EMPLOYMENT AGREEMENTS

Employment agreements are drafted from information on the employment checklist, which is emailed to the house corporation in February or March of each year. These agreements serve the following purpose:

- Confirm whether the house director is non-exempt or exempt, availability of fringe benefits for the employee and a list of their paid days off.
- Decide on a pay increase for your house director.
- Designate the credit limit for the house director's Chase credit card. You may also designate a dollar limit for authorization purchases (e.g., if a purchase is under \$500, no house corporation approval is needed on that item or service).
- *Note:* We will also request employment checklists completed for all employees except kitchen assistants.

## INTERVIEW PROCESS AND PREPARATION

Interview Process and Preparation - EMS

- For house corporations that use EMS, your Human Resources Business Partner at Executive Offices handles the entire sourcing and recruiting process. OOH will develop and post the job opening, review applications and prescreen the candidates. The top three candidates will then be presented to the house corporation for final interview and selection. Once the house corporation has selected the final candidate, the Human Resources Business Partner will make the job offer and check the candidate's references.

If the house corporation is not on EMS, the following steps are taken during the interview process:

Before the Interview:

- Select a definitive time, date and location for the interview that allows for no interruptions.
  - Select a comfortable, private setting for the interview.
  - Do your homework – review the resume and application ahead of time.
  - Create a list of job-related questions you will ask the candidates.

Once resumes for the position have been received, the employment committee will meet to review the resumes and devise a shortlist of candidates to interview. Each candidate will complete a Delta Gamma employment application (*see Appendix*). It is recommended that the candidates are interviewed separately by as many members of the employment committee as possible. If necessary, the collegiate member of the employment committee may elect to partner with the ATC or another committee member to interview.

During the Interview:

- Put the applicant at ease with a little small talk. Let them know what you will be discussing and review their application to confirm all information.
- Ask each candidate the same open-ended questions and make notes of the answers to questions.
- Tour the house and introduce them to chapter members you encounter. Note how many questions the applicant asks about the job.
- Observe their communication skills.
- Never show surprise at anything the candidate says, nor openly disagree or cross-examine the candidate.
- Be positive and enthusiastic.

After all candidates have been interviewed, the employment committee should rank in order the candidates based on knowledge, skill and ability. A final candidate should be selected from that group.

When a candidate has been selected, the ECC will contact them via telephone with a verbal offer of employment.

- If the candidate accepts the position, they should then be presented with an employment agreement/offer letter.
- Professional references should be obtained at that time (*see Appendix*).
- The Delta Gamma Human Resources Business Partner will:

- Receive offer information from the employment committee using the employment checklist (*see Appendix*).
- Create the employment agreement.
- Email the new hire paperwork to the candidate for completion.
- Once the employment agreement and new hire paperwork is signed, the house corporation will create a file for the new employee and keep a record of the employment paperwork for the duration of their employment period with Delta Gamma.
  - Copies of all employment paperwork must also be sent to the Human Resources Business Partner for audits and IRS reporting purposes.

## PERFORMANCE REVIEWS

Each year, a review of each employee's performance should be conducted by their direct supervisor, whether that be the house director or employment committee chair.

- This review should be in person with each employee, by the house director or employment committee chair, using the position's job description as the basis for this review.
- The employee should receive a copy of the performance review. The performance review form will be emailed by the Human Resources Business Partners each spring.
- During the review meeting, the employee and the supervisor should formulate an action plan for employee development or improvement.
- The performance review should be held later in the year when the committee considers the renewal of employment agreements or general employment, as well as rate increases for the following year.
  - Rate increases should be discussed in conjunction with the house corporation board, as it would factor into the overall house corporation budget due March 1.

Establishing expectations and goals at the beginning of the academic year is essential. This begins with providing feedback, which should be part of your regular practice. There are two overarching instances when feedback is needed for employees:

1. Behavior needs to be corrected or redirected when an employee is not meeting the expectations of their position.
2. An employee is doing a great job and this behavior will hopefully continue.

Why Provide Feedback?

1. *Increase employee engagement.* Providing regular feedback about what employees are doing well or what is expected allows better engagement with the work needed to improve.
2. *Increase performance.* If you tell employees that they are doing a great job, they are likely to do a better job! Likewise, providing critical feedback allows employees an opportunity to improve their performance.

3. *Enhance motivation.* Opportunity for improvement increases motivation in employees, when communicated effectively. By working with supervisors to identify areas for improvement, employees are more likely to strive toward it.
4. *Tool for career development.* We have the unique opportunity to be instrumental in career development for all employees. Students on your payroll, especially, may not see this role as a step in their career, which highlights an opportunity to help them develop professional skills they will take forward with them for years to come!
5. *Increase member satisfaction.* By providing feedback to employees, they will hopefully be more equipped to serve the members in the chapter in optimal ways.

#### How to Provide Feedback

1. *Train and communicate.* An employee cannot meet the expectations of their jobs if they do not know what the expectations are. Before providing critical feedback, consider if the employee was trained on the responsibility in question.
  - a. For example, the kitchen assistant who has worked in the same role for another organization in the past will not know what Delta Gamma expects.
2. *Take notice of behavior.* It is important to observe and focus on the employee's behavior, rather than personality, keying in on specific behaviors that should be altered or encouraged to continue.
3. *Plan and provide honest feedback.* Plan for the conversation you need to have with the employee, so specific examples can be provided. Feedback should include both criticism and praise. Highlight something they are doing well and watch your tone while providing feedback so not to condescend or upset the employee and distract from conversation.
4. *Document.* Keep record of the feedback on the date provided so progress can be tracked.
5. *Follow up.* Be clear about your intention to follow up with the employee (e.g., "Let's check in again in two weeks to see if this is getting better so that I can be sure my feedback is helpful to you."). Follow through on your follow-up! If the behavior does not improve, let the employee know this and consider a performance improvement plan.

### CLASSIFICATION OF EMPLOYMENT

The employment committee is the final authority for the establishment of positions, titles and length of appointments. The house corporation board is the final authority on salaries and benefits due to their connection with the budget.

Employment with Delta Gamma is classified in two ways:

1. According to the number of hours the employee is scheduled to work
2. According to the employee job duties and responsibilities

### FULL-TIME AND PART-TIME CLASSIFICATIONS

There are two working-hour classifications:

1. *Full-time*: Employees are classified as full-time if they are regularly scheduled to work 40 hours or more per week.
2. *Part-time*: Employees are classified as part-time if they are regularly scheduled to work less than 40 hours per week.

## EXEMPT AND NON-EXEMPT CLASSIFICATIONS

Delta Gamma classifies an employee as either *exempt* or *non-exempt* for purposes of the federal wage and hour laws based on the employee job duties and responsibilities.

1. *Exempt* employees are employees who, because of their positional duties and responsibilities and level of decision-making authority, are exempt from the overtime provisions of the 2005 Fair Labor Standards Act (FLSA).
  - a. Exempt employees are expected to work whatever hours are necessary to accomplish the goals and deliverables of their exempt position. Thus, exempt employees have more flexibility in their schedules to come and go as needed to accomplish work than non-exempt or hourly employees.
  - b. Exempt employees are most often found in managerial, supervisory, professional, administrative and functional leadership roles.
2. *Non-exempt* employees are employees who, because of the type of duties performed, the usual level of decision-making authority and the method of compensation, are subject to all Fair Labor Standards Act (FLSA) provisions including the payment of overtime.
  - a. Non-exempt employees are normally required to account for hours and fractional hours worked.

## ELIGIBILITY FOR EMPLOYMENT

### Eligibility Requirements

- Individuals seeking employment must be a citizen of the United States, a non-citizen national of the United States or a lawful permanent resident.
- Individuals must offer such proof of identification in filing a federally required Employment Eligibility Verification Form I-9.

### E-Verify

- E-Verify is a free, internet-based system that allows organizations to determine the eligibility of their employees to work in the United States.
- The completed I-9 form and corresponding documents must be entered into E-Verify within three business days from the employee's date of hire.
  - Participation is required in the following states: AZ, FL, GA, IN, ID, LA, MI, MS, MO, NE, OK, TN, UT, VA and WV.

### Rehire

- If a former Delta Gamma employee is in good standing, they are eligible to be rehired. The employee must meet all requirements for the position under consideration.
  - If an employee is rehired less than one month from their resignation date, new hire paperwork is not required to be completed.

- If an employee has been away longer than one month from the organization, all new hire paperwork must be completed, and they will be considered a new employee.

#### Personnel Records

- The employment committee maintains a permanent employment record on each employee. The file may include, but is not limited to, application for employment, references, correspondences, disciplinary/coaching forms, wage changes, benefit enrollment and tax deduction information (*see Appendix*).
- Employees may review their personnel files upon submitting a written request for access to the employment committee during active employment at Delta Gamma.

#### Introductory Period

- Newly hired employees, employees transferred to another position and employees promoted to a higher-level position shall be considered on an introductory status for a period of 60 calendar days from the date of employment or promotion.
- During this period, the immediate supervisor and/or the employment committee will observe the employee's work performance and general suitability for the position.
- At the supervisor's discretion and consulting with the Human Resources Business Partner (if on EMS), the introductory period may be extended for no more than an additional 30-day period. If the house corporation is not on EMS, the employment committee is responsible for initiating termination with proper documentation if the employee's performance is not acceptable.

#### Resignation and Termination

- An exempt employee is required to provide one working months' notice when resigning from Delta Gamma unless otherwise waived by the employment committee.
- A non-exempt employee is required to provide two working weeks' notice unless otherwise waived by the employment committee.
- A separation form should be completed and sent to the Human Resources Business Partner (*see Appendix*).

## Members-at-Large

Position description can be found in the [Fraternity & Foundation Volunteer Position Description Handbook](#).

# House Director

## DUTIES OF THE HOUSE DIRECTOR

The house director should review and sign the job description acknowledging understanding of their job duties. Please refer to the official job description provided by OOH. An example description is provided below.

### House Director Job Description

The house director is responsible for the overall operations of the house, including but not limited to the day-to-day maintenance, cleanliness, food service and safety of the house. The house director consults with the house corporation or the OOH Managed Property Specialist for guidance and assistance in executing the following duties.

- Ensures a safe and productive environment for collegians and staff.
- Responds appropriately during all emergency situations by contacting appropriate parties.
- Creates a strategy for the long-term care and upkeep of the facility for the house corporation board or Managed Property Specialist.
- Communicates house maintenance issues to the house corporation or Managed Property Specialist and coordinates all routine maintenance issues in a timely manner. Manages all minor repairs within agreed amount in a timely manner. Notifies house corporation or Managed Property Specialist of major repairs that exceed agreed amount with estimates that need to be done. Reports immediately to the house corporation or LLC Specialist all hazards and damages that require insurance claims.
- Stays within the given budget for ad hoc expenses; reconciles receipts and purchase orders; reviews and submits for payment through appropriate party.
- Purchases kitchen, cleaning and other necessary supplies while maintaining inventory.
- Recruits, interviews, conducts staff performance evaluations/discipline warnings and supervises staff with input from the ECC/Managed Property Specialist and Human Resources Business Partner (if on EMS).
- Processes new hire paperwork, schedules staff and submits timesheets in a timely manner.
- Collaborates with the chef/kitchen food service and the collegians to plan nutritious meals within budget.
- Manages multiple preferred service providers to resolve issues while staying within budget.
- Remains with all visitors at all times, including service providers.
- Keeps the house corporation or Managed Property Specialist informed of any inspection by insurance adjusters, fire department, government agencies or others concerned with the maintenance, security and safety of the house.
- Assists the director of house management with the required fire drills and other required inspections, specifically seeking out any damage to the house.
- Meets and regularly communicates any unusual trends, activities and/or problems with the chapter to the ATC.

- Meets regularly with the director of house management and attends any meetings with chapter members and/or boards as necessary.
- Must reside in the chapter house each night the residents are in residence.
- Adheres to university, house corporation, OOH and chapter policies and rules.

#### Required Skills

- Excellent organization and communication abilities
- Basic bookkeeping
- Knowledge of Microsoft Outlook, Word and Excel, as well as simple spreadsheets and scanning of PDF files
- Positive solution-focused attitude
- Ability to interact professionally and diplomatically with students, parents, alumnae, service providers and community resources
- Strong interpersonal skills, including the ability to work with college-aged women, patience and flexibility
- Proven managerial skills
- Ability to climb up and down several flights of stairs and lift 25 pounds if necessary

#### Professional Experience

- Previous house director experience
- Property management experience

#### Time Commitment and Benefits

- 40+ hour workweek with a suite and utilities provided.
- Must be onsite, overnight, seven (7) nights per week except when prior arrangements have been made for other adult supervision.
- All meals will be provided when the collegians are in the house.

\*\*This is a smoke, alcohol, federally illegal drugs, animal and firearms free environment.

### **HOUSE DIRECTOR RESOURCES**

The following information should be kept close at hand to assist with performing job duties effectively and efficiently:

1. A roster of the advisory team
2. A roster of the house corporation board
3. A roster of the regional team
4. A copy of the chapter composite photograph
5. A list of university health services, reliable doctors and community hospital phone numbers
6. A list of employees, with addresses, email addresses and phone numbers
7. A list of suppliers, vendors, cooperative buying associations, etc., with phone numbers
8. A list of approved repairmen, handymen, fire and security system and service technicians with phone numbers as well as proof of insurance or liability waivers.
  - a. This is a requirement for them to be paid, so please obtain record if you do not have it on hand.

9. A copy of your employment agreement and the house director job description
10. The chapter housing rules, including any waivers to Delta Gamma policy
11. Calendar for the chapter showing special chapter functions as well as open and close dates for the house
  - a. *Note:* These dates may be different from university open and close dates.
12. University calendar showing holidays, examinations, openings and closings
13. Meal schedules, copies of menus and the budget allowance for food
14. An inventory of the kitchen equipment, supplies, linen and table settings
15. Records relating to keys, locks or codes necessary for the security of the house
16. A list of the names and phone numbers of the other house directors on your campus

*If you cannot readily locate this information, contact your ECC, house corporation president or Managed Property Specialist, if applicable, to help you retrieve the data.*

## HOUSE DIRECTOR KEY RELATIONSHIPS

The house director should understand the responsibilities of various members of the advisory team and know who to contact concerning specific matters. In many cases, specific advisers will need to consult the house director to perform their duties, and advisers may ask the house director to provide advice related to house management. In addition, the advisory team will expect the house director to inform them of any disturbing or unusual trends or problems within the chapter. They will work together to see that such conditions are corrected if such action is needed.

chapter president

- Together, the house director and chapter president set the pace and tone for the chapter through consistent, regular communication. The president and director of house management/chapter property will keep the house director up to date on the events of the chapter and any calendar changes. The house director should work with the president to:
  - Report any problems within the chapter that require Honor Board action, including major infractions or repeated infractions of the university regulations, the Fraternity Constitution, Delta Gamma policies and procedures, the chapter house rules, as well as federal, state, provincial and civil laws via a written report.
    - If possible, the policy violation should be photographed.
  - See that arrangements are made for Collegiate Development Consultants (CDCs) or any visiting Fraternity officers.

vp: social standards

- In the absence of the president, the house director is expected to report to the vp: social standards any problems within the chapter that require Honor Board action.

vp: finance

- The house director and the vp: finance must work together to:
  - Ensure that the chapter budget allowance for food and supplies is satisfactory.
  - Approve household bills for payment by either the vp: finance or the house corporation.
  - Ensure bills are promptly paid to vendors.
  - Maintain any petty cash funds from the chapter in the proper manner and collect and submit receipts in a timely manner.
  - Propose house rules for chapter approval.
  - Ensure collections are made promptly for guests eating in the chapter house if such charges are applicable or appropriate according to the chapter bylaws and standing rules.

#### director of house management/chapter property

- The house director and the director of house management/chapter property should always work closely together due to the close alignments of their roles and shared responsibilities.
- The director of house management/chapter property and chapter president should keep the house director up to date on the events of the chapter and any calendar changes. The house director and the director of house management/chapter property should:
  - Maintain communication between the house director and the chapter.
  - Ensure that the chapter house and grounds are always in acceptable condition.
  - Work together to arrange necessary repairs.
    - The director of house management/chapter property should report any necessary repairs to the house director, and the house director should obtain the approval of the house corporation for the repairs.
  - Collaborate on checking the security of the house and changing the door codes or locks.

#### director of social events

- As the director of social events is responsible for providing a framework of social experiences for the chapter, she will work closely with the house director whenever an event is planned that involves a change in the normal functioning of the chapter house.
- When the chapter is planning an event at the chapter house, the director of social events and the house director should review:
  - The number of guests for meals and any special changes in the menu
  - The table or room decorations, which may present a change in meal service
- When the chapter will be entertaining individual guests, the director of social events and the house director will:
  - See that the guests are greeted and made to feel welcome and comfortable in the house.
  - Plan for special seating in the dining room.

#### vp: membership

- Since recruitment traditions and regulations vary greatly from one campus to another, the vp: membership and the house director should meet to discuss needs or changes in regular routine during both formal recruitment and continuous open bidding (COB). Discussion should focus on:
  - The house director's role during recruitment or COB
  - Food or drink requirements during recruitment and their budget allocations
  - Schedule of meals for chapter members during work week and recruitment
  - Clean-up duties
  - Number of prospective new members at regular meals during COB

#### chapter members

- The house director's relationship with the chapter members is one of great importance, as the house director is asked to:
  - Act as the chapter's official hostess
  - Understand university, Fraternity and chapter rules and regulations and guide chapter members in observance of them
  - Help foster harmonious relationships between the chapter, the university, the Fraternity, the advisory board, the house corporation board and alumnae
  - Advise on proper etiquette
  - Understand and respect the many commitments and interests demanding the members' time and energies
  - Be a willing listener
  - Be informed of the campus life and the community

#### chapter advisory team

- Each Delta Gamma chapter is served by alumnae members on an advisory team. The number of women on the team will vary from chapter to chapter, but normally four to eight alumnae will serve. The advisory team advises, counsels and guides; it does not govern the chapter or the chapter officers, and it does not determine nor dictate chapter rules and bylaws. The ATC serves as the house director's primary contact on the advisory team. Certain authorities are granted to the advisory team, including the authority to:
  - Require the chapter to observe Fraternity policies and procedures, house rules, university rules and college Panhellenic rules
  - See that the chapter cooperates with university administration, Panhellenic groups, alumnae, the house corporation, the house director and other employees.

#### local alumnae

- The alumnae chapter or association in the community may occasionally hold meetings or events at the chapter house. The following may be expected of the house director:

- Work as a liaison between the president of the local alumnae group, the house corporation president and the chapter president to decide on dates that are available and convenient for all parties concerned.
- Take charge of certain aspects of such alumnae functions.
- From time to time, visiting alumnae may drop by and want to see the house. The house director, in her role as hostess, should assist by supervising the tour of the house.

## HOUSING POLICIES

Delta Gamma has two policies that directly relate to Delta Gamma house directors. The complete selection of policies can be found in the Delta Gamma Library. All house directors are expected to know, enforce and abide by all Delta Gamma policies.

### Accounts Payable – House Director

- SmartData is the system used to reconcile your Chase Credit Card.
- For a demonstration of utilizing SmartData to track your expenses and to upload receipts for purchases, please access the [Using Smart Data: OOH webinar](#) in the Delta Gamma Library.
- For information related to uploading a receipt to SmartData, reference the supplemental information in the Processes section of this manual.

### Expense Reports

- Reference [Housing Expense Report](#).
- Reference [Expense Reports for Reimbursement of Personal Costs](#).

## SAFETY, SECURITY AND HEALTH

### Background Checks

- All new employees are required to complete the background process, which includes a thorough background check and social security number verification. All forms are completed electronically through our background check vendor. Unsupervised vendors, defined as a vendor who has access to the house (key fob or door code) without house director supervision, are also required to complete a background check, but not social security verification.

### Emergencies

- Each Delta Gamma chapter has an emergency action plan developed by the house director and the director of house management/chapter property, with the assistance of the advisory team, the house corporation board, Fraternity policy and the local fire marshal.
- In the case of an emergency involving a member of the chapter, the chapter has specific policies and procedures to follow, so let the chapter officers take the lead.

- The chapter president is in charge and must be contacted.
- *The house director should not contact parents; medical or police personnel will inform parents as necessary.*
- Do not allow accident victims to be disturbed by untrained persons. Do not attend to accident victims yourself.
- Instruct all members that only the chapter president (or if she is not available, the next ranking officer) should speak for the chapter once she has received guidance from the ATC and/or the Regional Collegiate Specialist.
- If a crisis has occurred within your chapter facility, close the facility to all non-Delta Gammas except for emergency personnel.
- In the case of any emergency, contact a member of the regional team, or Executive Offices at 614-481-8169.

### Fire Drill Procedures

- Pay attention and respond quickly to the alarm.
- Ensure all members know drill procedures and follow them.
- Do not retrieve any personal items not in the immediate area.
- Be sure lights are out and doors are closed.
- Evacuate the building via the nearest useable exit.
- Outside the building, go to the designated areas.
- Have a procedure in place to take roll or determine that all members living in the house are accounted for.
- Always follow the procedures of a drill as though it is an actual event.

### Weather-Related Procedures (e.g., flood, hurricane, tornado)

- Pay attention and respond quickly to the alarm.
- Do not retrieve any personal items outside of the immediate area.
- Listen to local civil defense officials or the National Weather Service.
- Ensure all members know the procedures and follow them.
- If asked to leave your area, be sure lights are off and doors are closed.
- Take shelter in an approved area, and do not leave the approved shelter(s).
- The house director should have a list of emergency phone numbers with her at all times during these procedures.

### Power Failures

- Occasional power failures are quite common. Unless the chapter house is prepared for such events, a power failure can be disorienting, causing other accidents or security problems, and affect the overall safety of the chapter.
- The house director and the director of house management/chapter property should be familiar with the location of fuse boxes, circuit breakers and the necessary technicians or local utility company that should be called for such an emergency.
- In the case of a long-term power outage, the ATC, CFA and the house corporation president should be notified in order to arrange alternate accommodations for the chapter women. A sufficient supply of flashlights and batteries is essential.

## Security

- Delta Gamma policy dictates that all housing will be locked 24 hours a day. It is the responsibility of the house director, along with the director of house management/chapter property, to see that this policy is enforced. The locks on all doors and windows should be kept in good working order.
- Safety standards establish a basis for acceptable action on the part of live-in collegians and employees. The house director should supervise all repair technicians while working in the private areas of the house, as well as to see that they provide quality work, are reliable and bonded. They should not be allowed to prop doors or windows open.
- The house director should walk through the house each night before retiring to make sure the house is locked and secured. The house director should make sure that the house corporation president always has the current door code and/or keys, which is especially important when the house is closed and the house director is not present.
- The director of house management/chapter property, the house director and the house corporation should have a plan in place for securing the house during school and summer breaks. The house corporation should have keys to the house and all security codes.

## Eating Disorders and Alcohol or Drug Abuse

- If you suspect an eating disorder or another personal issue such as alcohol or drug abuse:
  - *Do not* discuss your concerns with the individual.
  - *Do not* diagnose this woman; only a doctor or medical professional can do that.
  - *Do not* discuss your concerns with her parents or her friends in the chapter.
  - *Do not* use the word “sickness.”
  - *Do go* to the chapter president or the vp: social standards. Tell them your concerns and they will handle it from there. Please remember that Honor Board is confidential, so you will not be informed of their actions. Remember, you could be helping this woman in a tremendous way.
- Most campuses have a center that provides information relating to these problems and many more. Please use those resources to learn more about these problems.
- If you feel that the chapter has not addressed the problem, your next step is to express your concerns to the ATC. Again, you may not be informed of their actions or the outcome, but you are doing your part to address the problem.

*The house director does not serve as a disciplinary agent within the house. When the house director becomes aware of violations of university, Fraternity or chapter rules, she should report such violations to the chapter president, vp: social standards or ATC. Any similar situations with the staff should be relayed to the house corporation and/or the ATC.*

## EMPLOYEE INJURY

### First Aid

- Regardless of the extent of safety precautions, accidents do happen. For this reason, the house director should be familiar with basic first aid treatment procedures.
  - If suggested by the house corporation or the house corporation employment committee, Red Cross first aid training, CPR directions and instruction for the Heimlich maneuver can be arranged locally.
- If an employee is injured on the job, determine if they need immediate medical attention. If required, send them to the nearest urgent care/hospital and inform them that the injury is covered under workers' compensation.
  - The employee is required to complete a first report of injury form even if it is a minor injury. The completed first report of injury form is emailed to our contact at MJ Insurance, Inc. (or through the state pool) and your assigned Human Resources Business Partner. Contact your insurance company for further instructions.
    - Injuries on the way to or from work are not covered.
    - A link to the "Form to Report Employee Injury" can be found in the Appendix section of this manual.

## REQUIRED POSTINGS

Most of the following required informational postings may be obtained by visiting the U.S. Department of Labor.

- Notice of paydays and place of payment
- Emergency phone numbers
- Workers compensation, discriminatory practices, safety and health protection posters
- Employment compensation and disability benefits rights
- Fair employment and housing act
- State and federal minimum wage
- State specific postings

## WORKING WITH VENDORS

### Step 1: Organization

- Consider using Google Drive to organize vendors. A suggestion from a seasoned House Director is below:
  - Create a House Master Spreadsheet with the following subtitles:
    - House Board & Advisors, National Connections
    - Utilities
    - City Services
    - Services
    - Exterior
    - Kitchen

- Computer/Wi-Fi
- Insurance
- Resources
- Other
- Contacts Miscellaneous.

The information that each contains is: Position currently serving or description of service, Title or name of company, Name of contact, Phone number, email address, Web or other address; general information, year service began.

- If you are a new House Director, there is usually some kind of list of existing vendors that the previous HD used.

### Step 2: Research

- Is the home older? If yes, seek out vendors with experience in caring for older homes.
- Finding a reliable contractor can be difficult, depending on your location. Use your network (other House Directors on campus) for referrals. Always research a referral's website prior to contacting the company.
- Obtain several bids
  - When you call, be sure to have the following information ready:
    - Name of Project
    - Start and Finish dates requested
  - Set up appointments for a walk through
    - Provide in-depth project details, discuss quality of workmanship
    - Inquire about how construction would be completed and the timeline involved
    - Ask about subcontractors
    - Request references to be included with bid information
    - Always be sure to make notes after the meeting that may be beneficial in the decision-making process of who wins the bid.
- Review all bid information with the House Corporation prior to hiring a vendor (if necessary).

### Step 3: Maintaining a good relationship

- Work with the vendor and AP department to confirm all necessary paperwork has been submitted in order to pay vendor in a timely manner. The Office of Housing requires a COLI and a W9. If the vendor wishes to be paid electronically then we would also need a completed EFT form.
- Communicate when invoices will be paid. Timely payment goes a long way in building respect and a positive working relationship.
- If a service worker does a good job, let the company know. A short email goes a long way.
- Consider recognizing vendors during the holidays with a luncheon or small token of appreciation (cookies or other treats).

## Director of House Management

### POSITION DESCRIPTION

The position description for the director of house management can be found on the Delta Gamma Library in the [Collegiate Chapter Officers Manual \(CCOM\)](#). A description for the Chapter Operations Committee, which is led by the director of house management, can also be found in the CCOM.

### ROOM AGREEMENTS

The Room Agreement is a document signed between the chapter and the live-in member in a housed chapter. It is an enforceable document but is not a lease and is not subject to landlord/tenant laws. It is an agreement that outlines the expectations and policies a live-in member will abide by upon signing. Each chapter should have a point system as part of their bylaws and standing rules. This directs the chapter as to who will be living in the house each year based on certain criteria. In general, the expectation for most Delta Gamma houses is that every member will live in the facility one year of their time on campus. The Room Agreement should be signed as soon as is possible. The newest version is available in the fall typically by October 1<sup>st</sup>. The reason for this is that dorms and off campus apartments often have students sign leases a year ahead of their occupancy. In order to ensure the house is filled, room agreements should be signed in the fall or early winter for the following academic year.

The importance of having all room agreements signed on a timely basis is that if the house is not filled in any given year, the entire chapter will be responsible for meeting the terms of the Annual Agreement which is executed by the chapter itself in the winter or early spring for the following year. Those terms do not change regardless of how many women have signed up to live in the house. Since 80% of the house's costs are fixed, there is very little the house corporation can do to lower expenses which means all members of the chapter would be responsible to pay for the empty beds and rent that would normally be charged to live-ins. It is to the chapter's great advantage to make sure all potential new members are told about the live-in expectation and that it is understood upon joining Delta Gamma that living in the house is both a privilege and a responsibility of membership. This way the house is full, the living experience is vibrant and the burden of paying to keep the facility safe and competitive is shared by all in the most appropriate manner.

The house corporation owns the house, and the collegiate chapter rents it from the house corporation through the Annual Agreement. This agreement is between the chapter and the house corporation. No individual members have an agreement with the house corporation.

The collegiate chapter pays the annual agreement to the house corporation, and the individual members pay for their room through a Room Agreement (RA). The RA is a legally binding contract. The member's financial obligation under the RA is billed through greekbill.

The contract is specifically called a "Room Agreement" rather than a lease, and landlord/tenant law does not apply. Legally speaking, the RA grants members a nonexclusive license to use the property. Those who reside in a fraternity or sorority house do not have exclusive possession rights as tenants in an apartment complex do. This is also why we can do things like room searches or "evict" someone from the property if they are expelled without having to go through the courts.

Chapters should look to their bylaws for guidance on how to fill the house. RAs should be given to members and signed based upon the university housing market for your campus. For example, if leases and university housing contracts for the next academic year are typically signed in January, then RAs should also be signed in January, as not to have members make alternate living arrangements until the chapter house is full.

If a member wants to get out of their obligation under the RA, contact your Regional Collegiate Specialist (RCS) for assistance. If a member living in the chapter house is expelled, she must vacate the premises within six (6) days of written notice of her expulsion. If a chapter facility is university owned, an expelled member should only be ordered to vacate with university approval.

## **DELTA GAMMA HOUSING POLICIES**

All Delta Gamma chapters are expected to abide by the Fraternity housing policies. Those policies can be found on the [Delta Gamma website Library](#).

## **CHAPTER STANDING RULES**

Chapter members are also expected to abide by the chapters Bylaws and Standing Rules as they pertain to the chapter facility.

## **PREPARING FOR FRATERNITY VISITORS**

The director of house management plays an important role in preparing the chapter facility to host Fraternity visitors, such as a Collegiate Development Consultant (CDC). The director of house management should work collaboratively with the director of social awareness on this effort.

Two weeks before a CDC visits a chapter, she will email the chapter officers with details regarding her arrival and her stay.

## **YOUR ROLE ON THE HOUSE CORPORATION**

You are a voting member of the House Corporation.

1. You should plan to attend all house corporation meetings.
2. Your position brings the voice of the chapter to the house corporation. You should prepare to offer opinions on issues with the house like replacing carpet, painting (help choose colors), etc. You can help prioritize the projects that you want done.
  1. For instance, perhaps the kitchen needs remodeled, but the chapter really wants to update the bathrooms first. Maybe the chapter even has a significant gift to give to the house corporation for a major project. The chapter's voice should be heard when choosing between the kitchen and the bathroom projects.

Talk to your chapter members and create a wish list for the house and present it to the house corporation on a regular basis. Ask for anything from a smart TV to a bike rack to a Keurig and more!

## **EDUCATE YOUR CHAPTER ON THE HOUSE CORPORATION**

As the director of house management, you will partner with the house corporation to educate the chapter on the role of the house corporation. In addition, you will ensure that chapter members are aware of rules of the chapter facility, as well as procedures for fire drills and the fire escape plan. Consider creating a house corporation bulletin board with photos to familiarize the chapter with board members and duties.

Work with the director of new members to include an introduction to the house corporation for new members during the New Member Pursuit.

House Rules

Fire Drills/Fire Escape Plan

## **ADDRESSING HOUSE CONCERNS**

As the director of house management, you will partner with Honor Board to uphold and enforce the housing policies as outlined in the chapter's Bylaws and Standing Rules and the Room Agreement. Violations to the statements of these agreements should be submitted to the Honor Board via a Statement of Obligation Review. Unless you also serve as a member of Honor Board, you will in most cases not receive

updates as to the outcome of any Honor Board proceedings. Regardless, it is important to continue to document and report any concerns you witness.

Concerns may arise that are not specifically governed by the Bylaws and Standing Rules or the Room Agreement. Examples may include concerns related to the emotional or mental well being of a live-in member, challenging interpersonal relationship among two live-in members, or roommate disputes. In these situations, Honor Board is still your best partner in navigating the concern. Please continue to work with the vp: social standards to make Honor Board aware of your concerns so that you can collaborate on next steps to support the member or members.

## COLLABORATING WITH OTHER CHAPTER OFFICERS

- Quiet Hours with Director of Scholarship
- Officers that don't live in – need to have office hours
- Honor Board/vp: finance – ensure they understand the implications (financial) of releasing women from Room Agreements
- vp: communications – House Director/House Corp member appreciation
- director of chapter archives or director of rituals – maintain accurate inventory of chapter archives or ritual equipment
- chapter president – help educate the chapter about *Crisis Management Procedures*
- chapter president, vp: social standards, and/or director of social awareness – prepare for Fraternity visitors

## FMC

How to request housing items ([view FMC Resource Information document](#))  
Maintenance requests will be on a case-by-case basis depending on if you are in a university owned property or a rental property

## Housed groups:

Working with the house director

Fire drills

Food service

Weekly meetings

Working with house corporation

Working with chapter

Chore Charts

Chore enforcement

Dates/times for move in/move out for all breaks

## **SAMPLE LIVE-IN/LIVE-OUR REQUIREMENTS: BLSR**

Here is sample language from chapter BLSR regarding the Live-In/Live-Out Requirements in Article VI. Housing:

### **Example 1:**

The house must be filled with initiated members. A member shall be required to live in the chapter housing facility provided there is space available. The Regional Collegiate Specialist or Advisory Team Chairman may approve any special exceptions. A member wishing to live in the house must be approved by the vp: finance.

Points will determine live-out status. Prior to the creation of the list for entry into the house, members will notify the chapter of whether they wish to live in or out of the chapter house by early October of the prior year. List for entry into the house will be determined by the chapters designated points system. List for entry into the house for the fall and spring semester will be made by October of the prior year. If the number of qualifying members requesting to live in fills the capacity of the house, all requested live-outs will be granted. If the number of members requesting to live in does not fill the house to capacity, the qualifying members with the lowest number of points as the housing point system set forth herein will be required to fill the vacancy.

If a member signs a housing contract, and then does not fulfill her obligations, her excuse will be subject to Honor Board approval and a Statement of Obligation Review will be written. But in no circumstances will she be relieved of her financial obligations unless the house is able to be completely filled by women who are approved by the ATC and who have signed housing contracts committing to full payment of live in costs. No member eligible to live in the house may move out of the house unless there is a qualified/approved member to take her place.

### **Example 2:**

A member shall live in Delta Gamma Housing for four (4) consecutive semesters. Delta Gamma Housing is defined as the Chapter House and a designated residence hall at University. Delta Gamma Housing shall be filled with initiated members only. A member is eligible to live in Delta Gamma Housing following her first full semester as an initiated member, provided space is available.

The list for entry into Delta Gamma Housing for the next year will be completed by December 1st. No member shall sign any local leasing agreement until Delta Gamma Housing is completely filled.

Any request for a waiver of a member's Delta Gamma Housing obligation will be subject to approval by the House Corporation Board, Honor Board, and the RCS.

### **SAMPLE ROOM ASSIGNMENTS PROCESSES:**

Here is sample language from chapter BLSR regarding Room Assignment processes in Article VI. Housing:

#### **Example 1:**

Based on the points outlined in Section 11, the order of room selection will go as following: president will be placed in the presidential suite, vice presidents (based off the designated points system), directors required to live in (based off of the designated points system), and then chapter members (order is based off of designated points system). A member may request a roommate when the member is selecting a room. If a serious issue occurs between roommates that lead to a strong desire for a room change, the member must request to see Honor Board to present the current issues with the presence of the director of house management. Together Honor Board and the director of house management will help with a solution. Members have the choice to switch rooms/roommates at semester, this is not required, but highly encouraged.

#### **Example 2:**

The point system outlined in Housing Point System, Section 10 as well as GPA will be used to determine room assignments, according to preference. The director of house management will release the room assignments in the third month of second semester. Members will have 5 days to submit in writing a complaint to the director for a room/roommate change. After 5 days any issues must come directly to Honor Board.

#### **Example 3:**

All CMT members will have first preference for rooming, in the following order: president, vp: social standards, vp: finance, vp: communications, vp: programming vp: member education, vp: membership, vp: Panhellenic, vp: foundation, and director of committees. The remaining room assignments will be made by seniority: seniors, juniors, and then sophomores. Within grade levels, room assignments will be decided by GPA. When determining Fall semester assignments, all rooms will be considered vacant.

## Appendix

### Forms

- [Room Search Guidelines](#)
- [Conflict of Interest Statement](#) (Housing Operations Manual page 27)
- [Whistleblower Policy](#) (Housing Operations Manual page 29)
- [Insurance Waiver Form](#) (Housing Operations Manual page 31)
- [Housing Request for Policy Waiver](#)
- [Form to Report Employee Injury](#)
- [W-9 for Vendor on Property](#)
- [W-9 Vendor Request](#)
- [Fire Drill Checklist](#) (House Corporation Handbook page 55-57)
- [Housing Expense Report](#)
- [Direct Deposit Set-Up](#)
- [Expense Report for Reimbursement from Personal Cost](#)

## Processes

Each house corporation should be ready to perform several processes that are required for successful operation. Some occur annually, some may never occur during your tenure. Please familiarize yourself with the items below:

### ANNUAL AGREEMENT

Every house corporation must have a written agreement between the chapter and the house corporation describing financial and other responsibilities of both parties. This agreement should be completed in the spring for the coming academic year. The housing situation determines which Annual Agreement form is to be utilized. These forms are provided by OOH. If circumstances warrant, an Annual Agreement may be amended with the consensus of the collegiate chapter, the house corporation board and the RHS with ultimate approval by the Fraternity Treasurer. The Annual Agreement no longer contains information about a damage deposit as neither house corporations nor chapters may collect deposits of any kind. The actual cost of repairs beyond normal wear and tear can be billed back to the chapter through the FHC Chapter Receivables procedure.

### ANNUAL REPORT

Every house corporation must complete the Annual Report on Anchorbase by June 30 for the last fiscal year.

### BUDGET PROCESS

The fiscal year for all Delta Gamma chapters and house corporations is July 1– June 30. Each year, the house corporation approves a capital budget and an operating budget. For the fiscal year, the capital budget will be due November 1 and the operating budget is due February 1.

- The purpose of the capital budget is to plan five years ahead for major projects or purchases. Items over \$500 are considered capital expenses and projects which are outside of the normal maintenance that happens at the facility annually are considered capital projects. Some examples of a capital project would be:
  - New chairs for the dining room
  - New washers and dryers for the laundry room
  - Remodeling the kitchen
  - Repaving the parking lot.
- For projects such as a new addition or changing the overall footprint of the property, there is a major projects approval process that needs to go to an outside committee before the project can begin. Any project needing financing in the form of a loan would also need the committee's approval. For more information on this process, click the link [here](#).
- The annual operating budget consists of various tabs that are completed by OOH such as the cash wizard and Schedule B based on each house corporation's actual financials. Schedule A shows the approved capital budget the house corporation completed earlier. The proposed budget is sent to the house corporation president and treasurer 30 days before the due date. It is

then the house corporation's responsibility to review the proposed budget with the board and edit any information. The figures on the proposed budget are based on the previous fiscal year and half of the current fiscal year's activity. Expenses that are subject to an increase, new contracts, salary raises or additional services need to be added by the house corporation.

- Once the house corporation board has completed and voted on the final budget, it is uploaded to Anchorbase by the deadline. The Director: Housing Operations and the RHSs will review and give final approval. The Annual Agreement is created by OOH based on the approved budget numbers shown on Schedule B in the bottom left box. Schedule B also shows a comparison by dollar and percentage of the budget in relation to the current year's budget. Typically, the increase to the chapter should be 3% or less unless there are very specific circumstances that warrant it. The final approved budget should be uploaded to Anchorbase and requires the approval of the vp: finance, RFS and house corporation treasurer. All three approvals need to be completed by March 1. It is very important to adhere to the deadline as the chapter budget cannot begin until the Annual Agreement is approved. For questions regarding the budget process, please contact Mandy Reymann at [mandyr@deltagamma.org](mailto:mandyr@deltagamma.org) or your RHS. For Anchorbase questions, please contact [FHCReports@deltagamma.org](mailto:FHCReports@deltagamma.org).

### **Cash Reserve Wizard**

Much of the planning information will be found in the Cash Reserve Wizard and is pre-populated for you based on information available. This worksheet will give you a snapshot view of how much money the house corporation needs to have *available* at any given time. It is formula-based, determined by half of your operating income, apart from catering. It also calculates how much cash will be available for future projects/purchases based on current year projections and the amount spent this fiscal year on capital expenses and unbudgeted items.

### **Schedule A**

This worksheet will assist the house corporation in determining the total cost of planned projects and give you a more concrete idea of whether there is enough cash available to complete those projects in the coming fiscal year. It is essential to get legitimate estimates from vendors or retail stores to accurately represent costs. Failure to do so will likely force postponement of some or all planned projects or cause an undue hardship on the chapter. If Schedule A-1 is not completed for the coming summer, then Schedule B (operating budget) may not reflect the income the house corporation is accustomed to receiving from the chapter. Your five-year capital budget has been included in Schedule A for your convenience. Updates to capital expenditures should be made on the *capital budget tab*. Updates to loans or fundraising income to be received should be made on Schedule A-2.

### **Schedule B**

This is the operating budget for the fiscal year.

1. *House corporation fees* should be at the levels stated by Fraternity policy:
  - a. \$150 for housed chapters, \$75 for suites and \$50 for no housing.

- b. Please contact your RHS and Mandy Reymann ([mandyr@deltagamma.org](mailto:mandyr@deltagamma.org)) if you have extenuating circumstances that you feel warrant a different amount.
2. *Capital reserve fund* is populated directly from Schedule A and reflects the amount needed for current and future projects based on the balance of the house corporation's cash reserves. Therefore, it is crucial to complete the capital budget first. If the house corporation has been saving effectively for many years or has accumulated a significant surplus without a project in mind, then this number may be blank. If the house corporation has a significant shortfall in its required reserves and recouping the necessary amount in one year is detrimental to the women, *the house corporation needs to be in communication with your RHS and Mandy Reymann so we can assist in deciding what can be collected in the fiscal year.*
  - a. Please read the notes in red. If a major project in the future will require a loan or outside source of income, only a portion may be added to this cell as the bulk of the project will need to come from a loan, fundraising and/or chapter gift. The increase to the chapter should remain at 0-3% annually unless there are special circumstances which will be noted on your budget.
3. *Loan principal payments* affect your cash balance and are considered in the calculations on Schedule B.
4. *Chapter receivables* are included on the Schedule B operating budget for informational purposes only and are not calculated in the budget. Although chapter receivables were previously billed under account #1270 and cleared at the end of each year, they are now being coded to account #6540 for long term tracking for expenses billed back to the chapter. The chapter will continue to budget these expenses in the same manner.

## CAPITAL BUDGET

The capital budget is due December 1, so it can be incorporated into Schedule A. If there are changes to the capital budget previously submitted, please update this tab. This allows the house corporation to collect for projects and purchases beyond the current season. Even if the chapter is not housed, the chapter wish list should be reflected on this budget.

## REVENUE & EXPENSE KEY

This key explains which income and expenses should be covered under each account on the budget. *Note: Some cells in the budget form are locked and cannot be manipulated. They represent a fixed expense or have a formula in them that may affect other cells on another worksheet. If you have any questions about locked cells, please contact Mandy Reymann at [mandyr@deltagamma.org](mailto:mandyr@deltagamma.org).*

## BUDGET CONSIDERATIONS

Please be sure to consider each of these areas prior to finalizing the house corporation budget:

- Payroll

- Changes in pay rates
- Additions or changes to benefits
- Replacing, adding or removing employees
- Vendors vs. Employees
  - Switching from a cook to a catering company means a change from salaries and taxes to the catering account
  - Switching from a housekeeper to a cleaning company goes under standard cleaning
- Fundraising
  - Fundraising expenses come out of the house corporation reserves on Schedule A and are shown each year on the Cash Wizard
  - Income can only be recognized on an annual basis.
    - Remember, most pledges come over a five-year period.

### **ADDITIONAL SERVICES**

- Employee Management Service (EMS)
  - EMS handles all the requirements of the employment committee (EC), works with the EC on all employee issues and ensures all training and paperwork is completed.
  - As part of the fee, EMS also includes recruitment of any new employees needed. The recruitment service finds professional, qualified and safe candidates for house director and chef roles from which the house corporation can select.

### **LOANS/MAJOR PROJECTS**

- Budget considerations for loans
  - The interest and principal payments for the year are shown on the operating budget on Schedule B.
  - The project itself (renovation, addition, new house) is shown on Schedule A-1 or A-3 for the year in which it is being done.
  - The loan proceeds must be accounted for along with any fundraising income or chapter gift on Schedule A-2 so it will not be charged to the chapter in one year. The yellow boxes on line 29, Schedule A should be filled in with the method by which the project is going to be paid.

### **MODEL BYLAWS**

Model bylaws should be reviewed with house corporation board members annually. Any amendments should be prepared for consideration at the annual meeting.

[Model Bylaws for Housed House Corporations](#)

[Model Bylaws for Unhoused House Corporations](#)

### **NEW MEMBER MEETING AGENDA**

A house corporation representative should meet with the new members to discuss the operation of the house corporation. Many times, new members wish to give a gift to the house corporation. That gift should be in the form of a cash donation unless authorized by the corporation furnishings committee.

Sample program for a new member meeting for a chapter with housing:

*We are here to talk with you about your house corporation. Let me introduce myself and the others here with me. (Intro all present house corporation members)*

*What is a house corporation? It's a separate corporation formed according to the Delta Gamma Fraternity Constitution to provide the chapter with a suitable social environment. Now, what exactly is a suitable social environment? In our case at \_\_\_\_\_ chapter, it means that we provide the chapter, not the individual members, with a (insert relevant facility) through an Annual Agreement. It is our responsibility to maintain the facilities. In order to do that, we have a house corporation board, consisting of alumnae members such as myself and (insert other members present and not present) and ex-officio voting members who are the chapter president, vp: finance and director of house management/chapter property. The board also includes the ATC and the alumnae group president as ex-officio voting members as well.*

*Since this is a corporation, we have shareholders, or members, as we call them. Once you've paid your house corporation fee of (insert amount for your group) during this first year of membership, you will become a full member of the house corporation and can attend any meeting of the board (if requested by you to the board in advance) and the entire membership is invited at the Annual Meeting which we hold in (insert month).*

*In order to work with the chapter to be sure our facility is up to date and competitive with other groups on campus, we ask each fall for a wish list from the chapter of things they may need or want for the (relevant facility). We do our best to make those things happen within the constraints of the budget and need for other items. Sometimes, we must put off the fun things for more basic chapter housing needs such as (insert new heat/cooling systems or other safety equipment).*

*The chapter's liability insurance, the insurance coverage for your events, is paid through the house corporation as well. So, this, along with the costs of operating the facility (add employees if your house corporation has them) are included in the house corporation budget and billed to the chapter through the Annual Agreement. It is paid by the individual members as resident rent and/or chapter obligation.*

*Also, we are planning for our (insert relevant milestone here). Just know that we always have your best interest in mind! Any questions?*

Sample program for a new member meeting for a chapter with no housing:

*We are here to talk with you about your house corporation. Let me introduce myself and the others here with me. (Intro all present house corporation members)*

*What is a house corporation? It is a separate corporation formed according to the Delta Gamma Fraternity Constitution to provide the chapter with a suitable social environment. Now, what exactly is a suitable social environment? In our case at \_\_\_\_\_ chapter, it means that we pay the chapter's liability insurance so that the social events that you have are covered. We can also help on occasion with other things that might be social in nature such as provide (insert what the house corporation does for the chapter). In order to do that, we have a house corporation board, consisting of alumnae members such as myself and (insert those members present and not present) and ex-officio voting board members who are the chapter president, vp: finance and director of house management/chapter property. The board also includes the ATC and the alumnae group president as ex-officio voting members as well.*

*Since this is a corporation, we have shareholders, or members, as we call them. Once you've paid your house corporation fee of (insert amount for your group) during this first year of membership, you will become a full member of the house corporation and can attend any meeting of the board (if requested in advance to attend) and the entire membership is invited at the Annual Meeting which we hold in (insert month).*

*The chapter's liability insurance, the insurance coverage for your events, is paid through the house corporation as well. So, this, along with the costs of operating the facility, are included in the house corporation budget and billed to the chapter through the Annual Agreement. It is paid by the individual members as chapter obligation.*

*Also, we are planning for our (insert relevant milestone). Just know that we always have your best interest in mind! Any questions?*

## **DISSOLUTION PROCEDURES**

Article XX of the Delta Gamma Constitution states that in the event that a collegiate chapter would be withdrawn from a college campus resulting in the dissolution of the house corporation serving that chapter, the net assets of the corporation are transferred to Delta Gamma Fraternity. Delta Gamma Fraternity will return these net assets in cash without interest to a new house corporation serving this same chapter if that chapter is reactivated on the same campus within ten years after the collegiate chapter charter was relinquished. This date references when Council votes to accept the collegiate chapter's charter.

For a house corporation's bylaws to be approved, the bylaws must contain a dissolution clause stating that the net assets will be transferred to the Fraternity.

In the unfortunate event that the need arises to dissolve a house corporation, the following steps should be taken by the board:

- *Vote to dissolve.* The vote must be recorded in the house corporation minutes and should coincide with the charter withdrawal of the collegiate chapter.
- *Set objectives for liquidation of property.* This step is important to ensure decisions regarding property are made in a consistent manner.
- *Establish a plan* and a timeline for liquidation of property that is cognizant of the chapter's closing ceremony.
- *Dispose of personal property through sale, gift or loan.* Receipts must be obtained for all distributions.
- *Liquidate real property by sale* in as timely a fashion as can be arranged. Notify everyone with whom the corporation does business (utilities, attorneys, service companies, banks, merchants, university/college, state, local and federal tax authorities) of the corporate dissolution.
- *Notify everyone* with whom the corporation does business (utilities, attorneys, service companies, banks, etc.)
- *Send all corporate records* to Executive Offices.
- The house corporation treasurer will *receive a letter* from the Fraternity Treasurer listing any other items to be sent to Executive Offices.

Each chapter/house corporation has an appointed trustee. Council appoints the trustee shortly after the vote to relinquish/dissolve a chapter charter. The trustee monitors the campus environment and regularly reports to Council regarding a possible return to campus.

Please keep in contact with your RHS. She can answer any questions that you might have and is happy to offer her services.

#### Wording of Dissolution Vote

*WHEREAS, the charter of <> of Delta Gamma Fraternity has been relinquished to [withdrawn by] Delta Gamma Fraternity,*

*THEREFORE, in accordance with Article XII of the <> House Corporation bylaws, and with Article XX, Section 4 of the Delta Gamma Fraternity Constitution, IT IS HEREBY RESOLVED AS FOLLOWS:*

*THAT, the <> House Corporation shall be dissolved, and its trustees, directors and officers are instructed to cause such dissolution to legally occur as soon as possible after the date of this resolution;*

*THAT, in conjunction with such dissolution, the physical property of <> House Corporation shall be liquidated, and all of the net assets of <> House Corporation should be transferred to Delta Gamma Fraternity;*

*THAT, such transfer of the net assets of <> House Corporation to Delta Gamma Fraternity is made with the understanding that Delta Gamma Fraternity shall hold such assets for a period of ten (10) years beginning the*

*date of the collegiate chapter charter withdrawal by the vote of the Council of Delta Gamma Fraternity. If <> is reactivated on <> Delta Gamma Fraternity will return these net assets in cash without interest to a new <> house corporation, serving <> collegiate chapter <>;*

*AND THAT, if <> is not reactivated on <> during such ten (10) year period, upon expiration of such ten (10) year period the net assets of <> House Corporation shall be transferred to and become the property of Delta Gamma Fraternity, to use for its general purposes.*

## **MAJOR PROJECTS APPROVAL PROCESS**

*Phase 1:* House corporation decides to undertake a major project which will require a loan and/or fundraising efforts.

1. House corporation notifies the RHS of their intention to gather information. The RHS gives the Director: Housing Development and the Regional Team notification.
2. House corporation gathers feedback from the chapter on how the space will be utilized, what things would enhance their living experience, any preferences on colors, etc. A committee of directors and collegians is ideal.
3. House corporation begins the process of getting drawings or renderings if applicable and works with an architect or vendor to get estimates on project.
4. House corporation contacts fundraising company to determine cost of feasibility study and/or newsletter if applicable.

*Approval 1:* [Using Form A](#), House corporation sends preliminary plans/ideas/estimates to the building committee. If the commission thinks the scope and use is reasonable, then they give approval to move to the next phase. At this time, the Director: Housing Development will converse with the house corporation regarding fundraising options and determine which direction to take.

*Phase 2:* House corporation sends cost estimates of major project plus amount of anticipated loan to the FHC who works on pro-forma to include all known expenses related and unrelated to project.

- House corporation should meet with the Chapter Operations Adviser or the ATC to discuss chapter increases associated with the project. A preliminary discussion about state of the chapter is important at this stage before plans are formalized.
- If house corporation is anticipating a loan, they will get estimates of interest rate, length and down payment requirements.

*Approval 2:* Along with [Form B](#), House corporation submits pro-forma created by the FHC to the RHS and Director: Housing Development. If the scope of the project (taking into account current reserves, potential loan, additional costs associated with professionals such as architect, fundraising company, etc.) necessitates a large increase to the chapter, then the RHS sends budget to the RFS to create similar pro-forma to show impact to live-in/live-out members. Both the collegiate and house corporation pro-forma budgets are considered when the Building Commission decides next steps, such as:

- approving plans as submitted

- going back to house corporation with more questions based on results of either budget
- asking house corporation to change scope of project
- checking with the regional team for any additional concerns.

If the Building Commission approves preliminary plans, then house corporation proceeds.

*Phase 3:* House corporation sends architectural plans out to bid and gets hard numbers from contractors. House corporation solicits banks for term sheets on loan and presents plans to the entire chapter.

1. House corporation gets two or more bids from licensed contractors and sends to FHC to update pro-forma budget. House corporation takes bids, budget and financials to banks to obtain commitments for financing. House corporation sends terms to FHC to incorporate into final pro-forma which is sent to CFA/RFS to update collegiate pro-forma budget.
2. House corporation along with Chapter Operations Adviser/ATC present costs to chapter and the impact of increases per member. Chapter takes vote to support the project and records vote in their minutes.
3. Per the bylaws, house corporation takes plans to Annual Meeting for a vote of the membership to enter into a loan using the house as collateral. House corporation records vote in their minutes.

*Approval 3:* All votes/minutes along with term sheet, fundraising results and pro-forma budgets are submitted to the RHS and Director: Housing Development. If the Building Commission approves, then it will be recommended to Council that house corporation can enter the loan agreement with the bank and sign contract with builder/construction. IF Council approves, THEN project begins.

*Notes:* If information comes back at any of the three approval junctures, then project can be changed, eliminated or tabled until a later date. Council is brought in after first two phases are complete and before final commitments are made to start the project. The RHS, Director: Housing Development, Building Commission and FHC work closely throughout the process to ensure that all parties, especially the collegiate advisers, are included and that the cost is transparent to the chapter members. Contingency plans for factors such as bank requirements, unanticipated additional costs and timeline not being met should be part of house corporation documents.

#### Building Commission

- The building commission involved in major housing projects is defined by the house corporation/Major Project policy. This commission is made up of the following members:
  - Director: Housing Development
  - Director: Housing Resources
  - Director: Finance
  - Director: Chapter Excellence

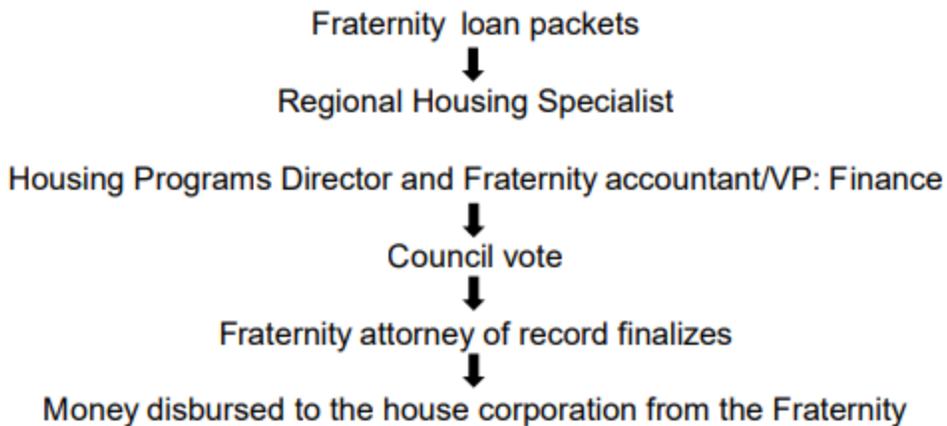
## LOAN APPLICATION PROCESS

## Local Loans

- After the preliminary budget has been prepared, the house corporation applies first to a local bank or savings and loan association for a loan. An established house corporation which has owned a house and shown good financial management should be able to obtain a loan. Local loans are secured by a first mortgage. A certified copy of a resolution authorizing the house corporation officers to secure a loan is usually required by local lending institutions. The resolution should be stated in the minutes of the board meeting at which the action was taken.
- The house corporation will provide to the local lender the following:
  - A copy of the house corporation financial statement for three to five years.
  - The pro-forma budget showing the ability of the chapter to support the loan.
  - A construction bid showing total cost of the project.
  - If required, the financial statement of the collegiate chapter.

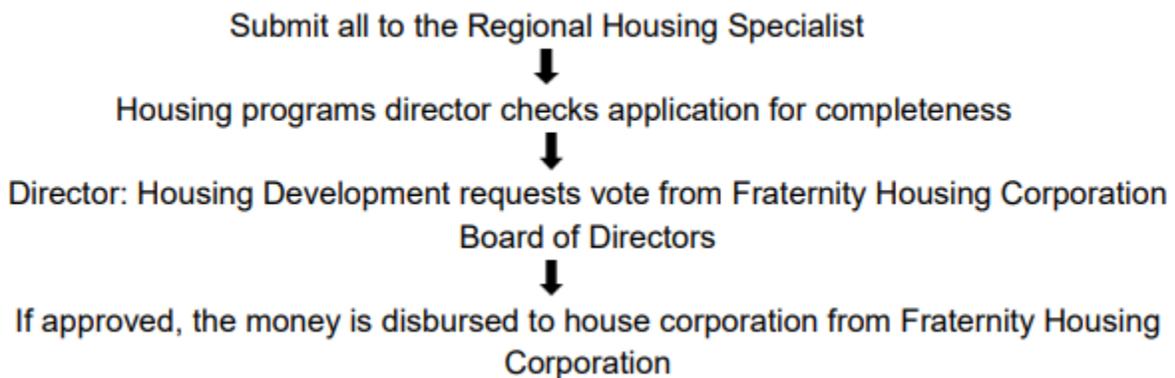
## Fraternity Loan Application Process

1. Request a loan application from the RHS for your area.
2. Attach the following:
  - House corporation board of directors vote to pursue loan as shown in meeting minutes
  - Collegiate chapter votes as shown in meeting minutes
  - Corporate resolution to borrow, including the following:
    - Amount of loan
    - Length of loan
    - Date of minutes when vote took place
    - Purpose of loan
    - Names, emails and phone numbers of officers
    - Amortization schedule
    - Copy of the deed and title
    - Copy of any outstanding loans
3. Submit all information to the RHS, who will send it to the housing program director. She will then check the application for completeness and confer with the Fraternity Accountant. Then it will be sent on to Council for a vote and copy the Director: Housing Development.



**FHC Loan Application Process**

1. The house corporation should discuss its intent to request a loan with the RHS. Upon RHS approval, the below procedure occurs:
  - A house corporation board of directors' corporate resolution to borrow, including the following:
    - Amount of loan
    - Length of loan
    - Date of minutes when vote took place
    - Purpose of loan
    - Names, addresses and phone numbers of officers
  - Collegiate chapter votes
2. Submit all information to the RHS, who will send it to the housing program director. She will check the application for completeness and send it on to the Director: Housing Development to request a vote from FHC Board of Directors.



**CONVERTING FROM FHC TO LLC**

House Corporation to LLC Transfer Process

- There should be conversation between the existing house corporation and FHC as to the possibility of the house corporation converting to an LLC prior to beginning the transfer process.
  - A house corporation may be interested because it cannot afford a large project or there lacks a volunteer pipeline to serve.
  - Conversely, FHC may identify house corporations lacking alumnae support who would benefit from an LLC conversion. In this instance, the FHC would contact the collegians and advisers regarding the options available to them to determine if this would be a good fit.

LLC Title Transfer Process

- Once it is decided that a house corporation will dissolve and become an LLC, the existing house corporation officers will need to sign the LLC Title Transfer form to give the FHC permission to dissolve the house corporation.

LLC Title Transfer Process

WRITTEN CONSENT IN LIEU OF  
SPECIAL MEETING OF THE BOARD OF DIRECTORS OF  
\_\_\_\_\_ HOUSE ASSOCIATION OF DELTA GAMMA FRATERNITY, LLC

The undersigned, being all of the directors of \_\_\_\_\_ House Association of Delta Gamma Fraternity, LLC, an Ohio nonprofit corporation (the "Corporation"), hereby waive notice of the time, place, and purpose of a meeting of the Board of Directors, consent to the adoption of and vote in favor of the following resolutions, and direct the Secretary of the Corporation to place a copy of this Written Consent in the minute book of the Corporation:

RESOLVED, that the Board of Directors hereby ratifies all prior actions taken by the Board of Directors and the members with respect to the dissolution of the Corporation.

RESOLVED, that Jessica Blevins of the Delta Gamma Office of Housing is designated by the Board of Directors as the authorized representative of the Corporation, and that the authorized representative is authorized and directed to take all steps necessary to give legal effect to (i) the transfer of property held by the Corporation and (ii) the dissolution of the Corporation, including executing and filing the deed conveying the property and all notices, returns, or other documents.

Upon execution of a counterpart of this Written Consent by each of the members of the Board of Directors of the Corporation, the foregoing actions shall have effect and validity as though taken by unanimous action of the Board of Directors of the Corporation at a meeting duly called and legally held.

\_\_\_\_\_  
ATC

\_\_\_\_\_  
Date

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chapter president

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Date

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chapter vp: finance

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Date

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director of house management

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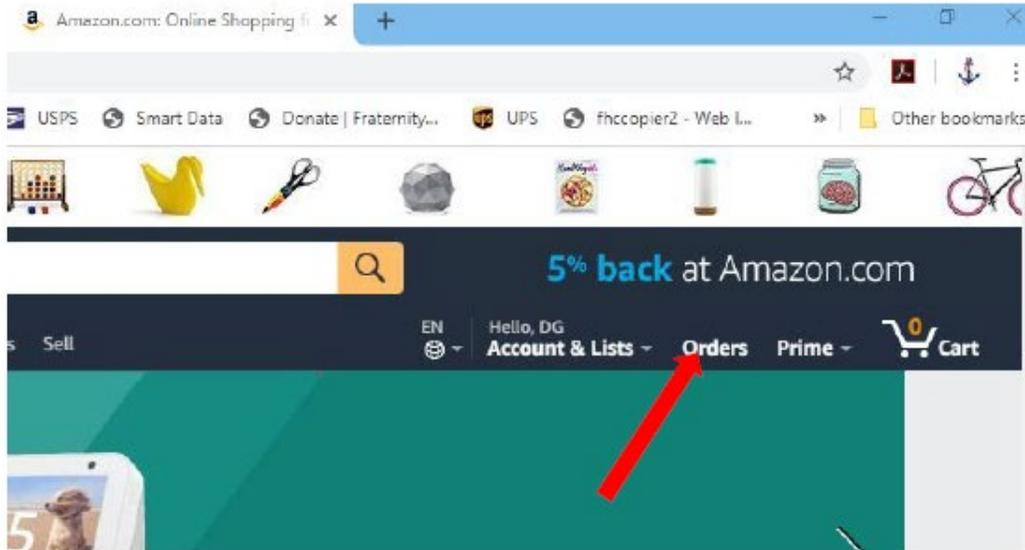
Date

## CREATING A RECEIPT FOR SMARTDATA UPLOAD

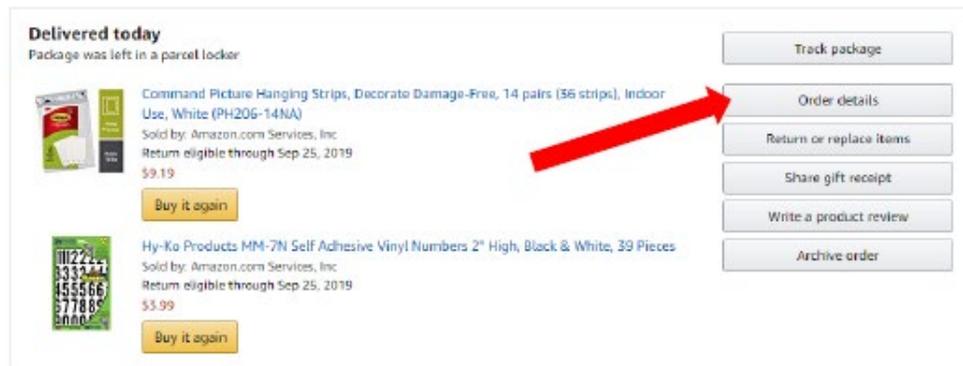
### CREATING A PDF RECEIPT FOR SMARTDATA UPLOAD

#### FOR AMAZON ORDERS

1) Click on Orders



2) Click on Order Details



3) Click on View or Print Invoice

## Order Details

Ordered on August 24, 2019 | Order# 114-6460233-0390663

[View or Print Invoice](#)

|  |   |   |
|--|---|---|
| <b>Shipping Address</b><br>Katalyn Bleau<br>5050 PIERCE ST BLDG L<br>ALLENDALE, MI 49401-8225<br>United States | <b>Payment Method</b><br>VISA **** 3553 | <b>Order Summary</b><br>Item(s) Subtotal: \$20.67<br>Shipping & Handling: \$0.00<br>Total before tax: \$20.67<br>Estimated tax to be collected: \$1.24<br><b>Grand Total: \$21.91</b> |
| <a href="#">Transactions</a>   |   |   |

### From here you can do one of two things:

- 1) Print the page for your records and scan image to your email
  - a. Save image to your computer and follow Upload receipt instructions from SmartData

Order placed: August 24, 2019  
Amazon.com order number: 114-6460233-0390663  
Order Total: \$21.91

[Print this page for your records.](#)

| Shipped on August 24, 2019  |              |
|---|--------------|
| <b>Items Ordered</b>  | <b>Price</b> |
| 1 of: Command Picture Hanging Strips, Decoral Damage-Free, 24 pairs (36 strips), Indoor Use, White (79209-1484)<br>Sold by: Amazon.com Services, Inc. | \$9.19       |
| 1 of: Hy-Vee Products HM-7W Self Adhesive Vinyl Numbers 2" High, Black & White, 36 Pieces<br>Sold by: Amazon.com Services, Inc.                       | \$3.00       |
| 1 of: U Brands Contempo Magnetic Dry Erase Board, 11 x 14 Inches, White Frame<br>Sold by: Amazon.com Services, Inc.                                   | \$7.49       |

OR

- 2) Locate your PrintScreen button on your keyboard (usually above your backspace button).
  - a. Push PrintScreen button
  - b. Open a word document
  - c. Right-click to paste image
  - d. Save as PDF to location where you keep receipts
  - e. Follow upload receipts instructions from SmartData

## Best Practices

### FIRE DRILL & KNOX BOX INFORMATION

1. Fire drills should be held twice per school year.
  1. Reach out to the closest fire station to you to schedule both fire drills.
  2. Call your fire alarm company prior to the fire drills and let them know you're putting the system in test mode. (Ask for training well before the fire drill if you haven't put the system in test mode before.)
  3. The first fire drill should be announced. Host a meeting before the fire drill to review evacuation routes. Be sure to communicate to the chapter when the fire drill will take place, but stress the importance of the seriousness of the fire drill.
  4. The second fire drill should be unannounced, but make sure your director of house management and the chapter president are aware of when it will take place.
  5. Have a rally point. Let the members know they should all meet at a predetermined point outside.
2. Items to record:
  1. Date and time of fire drills
  2. Did everyone evacuate? Y/N
  3. How many minutes did it take for everyone to evacuate the house?
  4. Questions/concerns/recommendations - be sure to consult chapter leadership and members on what can be improved.
2. It is recommended that evacuation routes be posted throughout the house in hallways as well as inside each room, including all bedrooms. Think of what you see on the back of hotel room doors.
3. It is recommended that Delta Gamma properties have a Knox Box.
  1. A Knox Box is located on the exterior of the house, near the main entrance.
  2. A Knox Box should have some or all of the following:
    1. Master key
    2. All access key fob
    3. Floorplan of the house.
    4. List of emergency contacts - house director, chapter president, director of house management, ATC. This will need updating as these roles change.
- b. Work with your local fire department once you have gathered all the items as only they will be allowed access to the Knox Box. You will need to contact them when you need to change the emergency contacts.

## SAMPLE KITCHEN INVENTORY LIST

| Recommended Equipment List                    | Number of Students |          |          |
|---|--------------------|----------|----------|
|   | Under 30           | 30 to 60 | 60 to 90 |
| Full Sheet Pans                               | 6                  | 8        | 10       |
| Half Sheet Pans                               | 3                  | 3        | 5        |
| Stock Pot W/ Lids<br>(approx 38 Qt)           | 1                  | 1        | 1        |
| Stock Pot W/ Lids<br>(approx 20 Qt)           | 2                  | 2        | 3        |
| Sauce Pots w/ Lids<br>(10-16 Qt)              | 2                  | 3        | 4        |
| 2" Deep Full Size<br>Hotel Pans               | 6                  | 8        | 12       |
| 4" or 6" Deep Half<br>Hotel Pans              | 4                  | 4        | 6        |
| 4" Deep Full Size<br>Hotel Pans               | 4                  | 6        | 8        |
| 12" Balloon Whisk                             | 2                  | 3        | 4        |
| 8oz Ladle                                     | 1                  | 1        | 2        |
| Solid Serving<br>Spoons                       | 8                  | 10       | 12       |
| Slotted Serving<br>Spoons                     | 8                  | 10       | 12       |
| Stainless Steel 4"<br>Deep 1/9 Pans           | 12                 | 6        | 6        |
| Stainless Steel 4"<br>Deep 1/6 Pans           | 12                 | 12       | 20       |
| Turners                                       | 2                  | 2        | 4        |
| Rubber Scrapers<br>(high temp)                | 2                  | 2        | 3        |
| Knife Set (Chef,<br>Boning, Bread,<br>Paring) | 1                  | 2        | 2        |
| Measuring Cups<br>(set)                       | 1                  | 1        | 1        |
| Measuring Spoons<br>(set)                     | 1                  | 1        | 1        |
| 2lb Oz Scale                                  | 1                  | 1        | 1        |
| 14" Teflon Saute Pan                          | 1                  | 2        | 2        |
| 12" Teflon Saute Pan                          | 2                  | 2        | 2        |
| 6" Teflon saute pan                           | 4                  | 4        | 4        |

|   |          |          |          |
|---|----------|----------|----------|
| <b>Cutting Board<br/>(18x24)</b>                              | <b>2</b> | <b>3</b> | <b>4</b> |
| <b>Small Mixing Bowl<br/>4qt</b>                              | <b>2</b> | <b>2</b> | <b>2</b> |
| <b>Medium Mixing<br/>Bowl 8qt</b>                             | <b>2</b> | <b>3</b> | <b>3</b> |
| <b>Large Mixing Bowl<br/>30qt</b>                             | <b>2</b> | <b>2</b> | <b>2</b> |
| <b>Instant Read<br/>Thermometer</b>                           | <b>2</b> | <b>2</b> | <b>2</b> |
| <b>Oven Thermometer</b>                                       | <b>1</b> | <b>1</b> | <b>1</b> |
| <b>Refrigerator<br/>Thermometer</b>                           | <b>1</b> | <b>1</b> | <b>1</b> |
| <b>Sink Stoppers</b>  | <b>1</b> | <b>1</b> | <b>1</b> |
| <b>2oz Ladle</b>  | <b>2</b> | <b>4</b> | <b>4</b> |
| <b>4oz Ladle</b>  | <b>2</b> | <b>2</b> | <b>2</b> |
| <b>Chafing Dishes or<br/>Electric Steam Table<br/>Bays</b>    | <b>3</b> | <b>4</b> | <b>4</b> |
| <b>Can Opener<br/>(commercial)</b>                            | <b>1</b> | <b>1</b> | <b>1</b> |
| <b>"Y" Peeler</b>   | <b>1</b> | <b>2</b> | <b>2</b> |
| <b>Hand Blender or<br/>Immersion Blender</b>                  | <b>1</b> | <b>1</b> | <b>1</b> |
| <b>4 oz Scoop</b>   | <b>1</b> | <b>2</b> | <b>3</b> |
| <b>Pie Turner</b>   | <b>1</b> | <b>1</b> | <b>2</b> |
| <b>Square Turner</b>  | <b>1</b> | <b>2</b> | <b>3</b> |
| <b>Perforated Pan Full<br/>Size hotel</b>                     | <b>1</b> | <b>2</b> | <b>2</b> |
| <b>24 ct. Muffin Pan</b>                                      | <b>1</b> | <b>2</b> | <b>3</b> |
| <b>Rolling Pin</b>  | <b>1</b> | <b>1</b> | <b>1</b> |
| <b>Cambro Storage<br/>Container 4 qt<br/>(including lid)</b>  | <b>2</b> | <b>4</b> | <b>6</b> |
| <b>Cambro Storage<br/>Container 8 qt<br/>(including lid)</b>  | <b>2</b> | <b>4</b> | <b>6</b> |
| <b>Cambro Storage<br/>Container 12 qt<br/>(including lid)</b> | <b>2</b> | <b>4</b> | <b>6</b> |
| <b>6" plastic bus tubs<br/>w/ lids</b>                        | <b>1</b> | <b>2</b> | <b>4</b> |
| <b>1 Gallon Measuring<br/>Pitcher</b>                         | <b>1</b> | <b>1</b> | <b>2</b> |

|  |                       |                      |                      |
|--|-----------------------|----------------------|----------------------|
| <b>3 Gallon Drink Dispenser</b>                    | <b>2</b>              | <b>2</b>             | <b>3</b>             |
| <b>Salad bar tongs 4"</b>                          | <b>10</b>             | <b>12</b>            | <b>12</b>            |
| <b>12" Tongs</b>                                   | <b>8</b>              | <b>8</b>             | <b>8</b>             |
| <b>16" Tongs</b>                                   | <b>2</b>              | <b>2</b>             | <b>3</b>             |
| <b>Wooden Spoons</b>                               | <b>2</b>              | <b>3</b>             | <b>4</b>             |
| <b>Collander 20 qt</b>                             | <b>1</b>              | <b>2</b>             | <b>2</b>             |
| <b>24 qt Rondo</b>                                 | <b>1</b>              | <b>1</b>             | <b>2</b>             |
| <b>Full Size Speedrack</b>                         | <b>0</b>              | <b>1</b>             | <b>1</b>             |
| <b>Food Processor</b>                              | <b>1</b>              | <b>1</b>             | <b>1</b>             |
| <b>Meat slicer</b>                                 | <b>1</b>              | <b>1</b>             | <b>1</b>             |
| <b>TOTAL</b>                                       |                       |                      |                      |
| <b>Refrigeration (not including Freezer space)</b> | <b>Min 45 Cu. Ft</b>  | <b>Min 60 Cu.Ft.</b> | <b>Min 90 Cu.Ft.</b> |
| <b>Freezer Space</b>                               | <b>Min 15 Cu. Ft.</b> | <b>Min 25 Cu.Ft.</b> | <b>Min 45 Cu.Ft.</b> |
| <b>Ice Machine (Highly Recommended)</b>            | <b>100lb</b>          | <b>150lb</b>         | <b>150lb</b>         |
| <b>Formal Ware</b>                                 | <b>Size</b>           | <b>color</b>         | <b>cases</b>         |
| Dinner plate                                       | 10.25"                | american white       | 15                   |
| Salad plate and dessert plate                      | 7"                    | american white       | 10                   |
| Water glass  | 16 oz.                | clear, goblet        | 30                   |
| Serving platters                                   | 12.5"x9.25"           | american white       | 6                    |
| Dinner knife                                       | 8.75"                 | Marquis              | 15                   |
| Dinner fork  | 7 5/8"                | Marquis              | 15                   |
| Salad fork   | 6 7/8"                | Marquis              | 15                   |
| Teaspoon   | 6 3/8"                | Marquis              | 15                   |
|  |                       |                      |                      |
| <b>Everyday Ware</b>                               |                       |                      |                      |
| Dinner plates                                      | 9"                    | white                | 6                    |
| Soup/cereal bowls                                  | 15 oz.                | white                | 6                    |
| Plastic tumblers                                   | 12 oz.                | clear, pebbled       | 7                    |
| Dinner knife                                       |                       |                      | 7                    |
| Dinner fork  |                       |                      | 7                    |
| Teaspoon   |                       |                      | 7                    |
| Coffee cup   | 7 oz.                 | white                | 6                    |
| Pitchers, plastic                                  | 60 oz.                | clear, 3 spouts      | 2                    |

## FHC WISHLIST TEMPLATE

Your chapter's needs for capital purchases and maintenance of your facility, if applicable, are handled by the FHC Board of Directors and Office of Housing Staff. To ensure we are able to meet the needs, submit a wish list annually. **This task is due October 1 on Anchorbase.**

- The director of house management works with the chapter management team and ATC to compile a list of items the chapter wants and/or needs. This form should be completed by the director of house management and provided to the House Corporation.
- This list should be ranked in order of priority. Higher priority items will be filled first when possible.

### Priority 1 (Item or Service)

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_

Website link for purchase / inspiration \_\_\_\_\_

### Priority 2 (Item or Service)

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_

Website link for purchase / inspiration \_\_\_\_\_

### Priority 3 (Item or Service)

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_

Website link for purchase / inspiration \_\_\_\_\_

### Priority 4 (Item or Service)

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_ Website link for purchase / inspiration \_\_\_\_\_

**Priority 5 (Item or Service)**

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_ Website link for purchase / inspiration \_\_\_\_\_

**Priority 6 (Item or Service)**

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_ Website link for purchase / inspiration \_\_\_\_\_

**Priority 7 (Item or Service)**

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_ Website link for purchase / inspiration \_\_\_\_\_

**Priority 8 (Item or Service)**

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_ Website link for purchase / inspiration \_\_\_\_\_

**Priority 9 (Item or Service)**

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_

Website link for purchase / inspiration \_\_\_\_\_

**Priority 10 (Item or Service)**

Item or Service \_\_\_\_\_

Quantity desired \_\_\_\_\_

Is this item or service a replacement of something currently utilized by the chapter?

Yes NO

If yes to the last question, why is this replacement needed?

\_\_\_\_\_

Website link for purchase / inspiration \_\_\_\_\_

## EXAMPLE OF MOVE-IN PROCESS

When: Saturday, August 4th from 8am - 6pm

1. Provide a sign up sheet for women to schedule when they will be moving in
1. Since there will only be (roughly) 16 parking spots available at the time of move in (need a confirmation on where a large dumpster would go), there will only be 16 spots on the sign up sheet per time slot.
2. Time slots will be 2 hour increments: 8am-10am, 10am-12pm, 12pm-2pm, 2pm-4pm, 4pm-6pm
3. Parking passes will be given to women when they arrive to move in, so that we can monitor the parking situation if need be.
  1. Women will only be allowed one car in the parking lot at a time. If they bring two cars, they can move their parking pass from one car to the other.
  4. Make women with assigned parking spots aware that they will not be able to park in their assigned spot until after the dumpster from move in has been removed.
2. A check-in table will be located in the parking lot during move in. CMT members will take turns manning the check-in table.

When women check in they will be given a folder containing

1. Room key
2. Parking pass
3. Damage inspection form
4. A list of the house rules and important policies
5. Important contacts
6. A map of the Fraternity/Sorority community
7. A schedule of prep week and recruitment
8. A roommate agreement

a. After women check in, they will be free to start moving in

Other Preparation to Consider:

- Should we have refreshments at move-in? Are other supplies needed, such as trash cans?
- Parking Passes
  - Color coded per time slot
    - Use a generic parking pass template & cut out colored sheets of paper
  - When a woman checks in, their name will be written on their parking pass and then they will be asked to keep it in their dashboards
    - If we need a car to move for any reason, we know who to ask

- What is the role of the House Director during move-in? Check-in table? Giving tours? Welcoming/hosting? Definitely be present and meeting residents and their families.
- What will be the role of CMT?
- Is it possible for a member to request a room or roommate change at move-in? What is the process for this, if so?
- What if a member shows up outside of their assigned time?
- What is the plan for parking? How will you ensure owners can be found if cars need to be moved from driveways, etc.?

## HOUSE DUTIES

[View a sample house duties schedule.](#)

## PREFERRED VENDOR LIST

### Designers

Whaley Campbell Design  
 Sarah Whaley Campbell  
<http://www.whaleycampbelldesign.com/>  
[Sarah@whaleycampbelldesign.com](mailto:Sarah@whaleycampbelldesign.com)  
 630-479-8435

PDR Interiors  
 Liz Toombs  
<http://pdr-interiors.com/>  
[Liz@pdr-interiors.com](mailto:Liz@pdr-interiors.com)  
 859.552.5234

### Food Service Vendors

Campus Cooks  
 Bill Reeder  
[president@campuscooks.com](mailto:president@campuscooks.com)  
 847-297-6439

College Chefs  
 Jordan Wigton  
[jwigton@collegechefs.com](mailto:jwigton@collegechefs.com)  
 217-369-7267

College Fresh

Jack Dawson  
[jack@collegefresh.net](mailto:jack@collegefresh.net)  
217-369-5743

### **Property Assessments**

CSL Management  
[www.cslmanagement.com](http://www.cslmanagement.com)  
Woody Ratterman  
423-225-8910