COLLEGIATE DIRECTOR QUICK GUIDE

director of funds

Chapters with more than 35 members should have a director of funds, though smaller chapters may also choose to have this position. The director of funds reports to the vice president: finance and serves on the joint chapter management team (JCMT). The director of funds helps the vp: finance keep the chapter financially secure, and helps share the responsibilities of chapter finances. This position can do any work relating to finance *except*: collect monies, make deposits and write checks.

RESPONSIBILITY RESOURCES

Anchor Games Finance	Greekbill Account Codes for Fundraising
Chapter Budget	<u>Collegiate Finance Handbook</u> ; previous budgets (in chapter files); current approved chapter budget;
Chapter Member Contracts	<u>Collegiate Finance Handbook</u> ; collegiate officer budget contracts, Dues & Fees Contracts, Room Agreements (all in greekbill)
Financial Good Standing	submit Automatic Probation Notices (APNs) and Statement of Obligation Reviews (SORs) via greekbill
Fines	greekbill; your chapter's Bylaws & Standing Rules (BLSR)
Fiscal Policies	Collegiate Finance Handbook; your chapter's BLSR
Greekbill Billing & Roster Changes	Member Account Adjustment (MAA) Request Form (in <u>greekbill</u>); <u>Anchorbase/greekbill Integration Guide</u>
Record Checks in Greekbill (not including members'	on campus spaces for chapter meetings and events

MARK YOUR CALENDAR

payments)

- Attend JCMT meetings.
- You will be copied on the vp: finance newsletter every other week. Make sure you read this!
- Participate in your chapter's events ... members need to see you participating!

LINKS TO BOOKMARK

- greekbill quick reference links.
- Anchorbase (for member roster, contact info for your chapter financial adviser, etc.)
- Check out the <u>Collegiate</u> <u>Chapter Officers Manual</u> (<u>CCOM</u>) for details on the responsibilities of your role.
- 2020-2021 <u>Collegiate Chapter</u> <u>Resource Guide</u> (Changes Due to COVID-19).
- Uphold the <u>12 Fraternity</u> <u>Standards</u> in all that you do.
- <u>eLearning</u> modules & <u>Delta</u> <u>Gamma Webinars</u>.

DIVE DEEPER

- Review your chapter's current budget with your vp: finance, COA and ATC. Make adjustments to expense budgets as needed based on your year-to-date spending.
- Questions? Email your Regional Finance Specialist (or your New Chapter Finance Coordinator). Their contact info is in Anchorbase.