



Breakout 1: Finance

Helpful Links

- [Alumnae Officer Navigation Guide: Finance](#)
- [memberplanet Success Site](#) - local dues set up
- [Marking a Member as Local Dues Paid](#) (check payments)
- [Alumnae Group Budget Template](#)
- [Fraternity Standards for Alumnae Groups](#)
- [Alumnae Officers Manual](#)
- [Alumnae Group Model Bylaws](#)
- [Fundraising Forms](#). Please choose the Alumnae FFRF training video to learn how to navigate Anchorbase in terms of fundraising submission forms.
- [Alumnae Dues Payments Frequently Asked Questions](#)

Websites

- <https://www.deltagamma.org/>
- <https://www.memberplanet.com>
- <https://anchorbase.deltagamma.org/>

Examples

- [Southeast Washington Budget](#)

Core Elements related to finance

Recruitment

- Have the required number of local dues paid members annually:
 - 20 or more members to qualify as an alumnae chapter
 - 10-19 members to qualify as an alumnae association.

Finance

- Group officers complete annual IRS tax filing and upload submission in Anchorbase > Finance > Tasks > Alumnae Group Tax Filing by November 15.
- Group officers pay all applicable fees and invoices to the Fraternity and Fraternity Housing Corporation (FHC) by deadline set by Executive Offices.

Alumnae Group Tax Instructions for FY23 (email from EO on 9/18)

Dear alumnae presidents and vps: finance,

It's tax time again for alumnae chapters and associations! **The mandatory deadline for filing taxes for your alumnae group is November 15, 2024, for fiscal year 2022-2023.**

The attached document titled [*Alumnae Group Tax Return Preparation Instructions for Fiscal Year 2022-2023*](#) contains the following information:

- Guidelines on which tax form to use for your alumnae group. Most groups will need to file [Form 990-N \(e-Postcard\)](#). Please do not file your group's 990-N through another vendor or site that will charge you a fee. The 990-N (e-Postcard) through the IRS website is a fast, easy and trusted way to ensure your tax filing is completed.
- Detailed instructions for filing Form 990-N, Form 990-EZ, and Form 8868.
- Links to supplementary tax form user guides and IRS resources. You may want to consult these resources for additional troubleshooting.

Alumnae groups can locate their Tax ID in Anchorbase > Operations > Tasks > Update Group Profile.

A copy of your tax return confirmation must be uploaded into Anchorbase > Finance > Tasks > Alumnae Group Tax Filing by November 15, 2024, in order for Executive Offices to credit you group as having filed for the year.

The IRS is no longer sending confirmation emails after submission, so please print or download the confirmation page as soon as you complete your filing so it can be uploaded into Anchorbase.

Email alumnaedep@deltagamma.org with questions about the attached instructions or about submitting your filing confirmation in Anchorbase. Delta Gamma Executive Offices cannot give tax advice regarding your local alumnae group. Please consult a local CPA or tax attorney with specific questions pertaining to your group's filing.

Fraternity and FHC Invoices (see email sent from EO on 10/3)

It is that time of year when Delta Gamma invoices all alumnae groups for their annual fee, technology fee, liability insurance fee, and Convention fee (for alumnae chapters). Full details on the prices set for the 2023-2024 fiscal year can be found in the [Schedule of Dues and Fees](#).

This email serves as your official notice that payment is due, as we will not be mailing invoices this year. Specific details for your alumnae group, as well as instructions for paying, are below.

Alumnae Group Billing Category: Association or 4 Tier Options for Chapters
Owed to the Fraternity: \$44 for associations or \$340-\$515 (depending on tier) pay with [this link](#)
Owed to FHC: \$20 for associations or \$40 for chapters pay with [this link](#)

Please note, you must complete two online payment forms or mail two checks to Executive Offices to satisfy your alumnae group's financial obligations for this fiscal year. Checks can be mailed together in one envelope but must be made out to separate entities.

Payments should be made in a timely manner by November 15, 2023. If you have questions, please email alumnaedept@deltagamma.org for assistance.

GENERAL LIABILITY INSURANCE

WHO IS COVERED?

Your organization's General Liability insurance program provides coverage for bodily injury, property damage and personal injury claims. The insurance program protects the following entities and individuals as Named Insureds:

- The local undergraduate chapter, its officers, members (including new members) and volunteers while acting on behalf of the organization
- House/Facility corporations, alumnae associations, colonies, and all members, employees and volunteers thereof while acting on behalf of the organization
- The national fraternity/sorority, foundation, other national entities, and all officers, employees, and volunteers thereof while acting on behalf of the organization

This coverage protects any Named Insured from third-party claims alleging bodily injury, property damage, or personal injury. This coverage will defend Named Insureds against any covered claim, even if the claim is groundless.

This coverage is for general public liability. It is not accident insurance covering members for injuries sustained on the chapter premises and/or during chapter activities. **This program is not a substitute for personal health or medical insurance.**