



Breakout #1

VP: Finance

September 14, 2025

Danielle Mason, ADC – Region 7

Julie Sikorsky, RAS – Region 2



Agenda

Welcome and Thank You!

- Introductions
- Defining the role and its responsibilities
- Budgets
- Dues
- Taxes
- Fees and Insurance

“A budget is more than numbers—it’s a reflection of values and a vision for the future.”

Raise a hand or enter Q’s in the chat pod.



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Introductions

In less than 30 seconds...

- Name
- Alumnae Group and Role
- Answer the prompt: *“If your group were to receive an unexpected \$1,000 tomorrow, how would you spend it?”*



Core Elements of VP: Finance

Money

- *Budget* preparation, approval, and upload to Anchorbase
- Complete the annual *IRS tax filing* and upload submission to Anchorbase by November 15th.
- Pay all applicable fees and invoices to the Fraternity and Fraternity Housing Corporation (FHC) by EO due date (11/15/25).

Membership

- Set up *local dues* in memberplanet as a QuickPay charge.

Goal - local *and per capita* dues-paid members annually:

- 20 or more members to qualify as an alumnae chapter
- 10 -19 members to qualify as an alumnae association.



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2025-26 Alumnae Officer Navigation Guide | vp: finance

Please use this as a guide of tasks and reminders throughout the year.

JULY	AUGUST	SEPTEMBER
<ul style="list-style-type: none"> Pay local and per capita dues Prepare a budget for the approval of the Executive Board using the Alumnae Budget Template to assist you Update bank account with signatures if new to role and/or president is new Sign Fraternity Local Volunteer Service Agreement in Anchorbase 	<ul style="list-style-type: none"> Present budget to executive board for approval Upload budget to Anchorbase - Operations > Tasks > Alumnae Group Information 	<ul style="list-style-type: none"> Review the instructions for preparing Annual Federal Tax Return Form 990-N, which are sent to alumnae groups in September from Executive Offices September 14 Attend Alumnae Group Academy along with rest of board
OCTOBER	NOVEMBER	
<ul style="list-style-type: none"> October 8-15 Do Good Week Prepare to pay annual dues and fees as invoiced by Executive Offices Send local dues reminder to members who have not paid local dues by end of month October 15 Alumnae Officer Survey responses due 	<ul style="list-style-type: none"> November 15 Pay annual dues and fees as invoiced by Executive Offices November 15 File Annual Federal Tax Return Form 990N or 990EZ with the Internal Revenue Service and upload confirmation to EO via Anchorbase Task 	
FEBRUARY	MARCH	
<ul style="list-style-type: none"> Feb 28 If funding a merit based scholarship or fellowship, funds must be received to be awarded the following academic year Optional: Upload final budget with actuals and variance to close fiscal year into Anchorbase - Operations > Tasks > Alumnae Group Information 	<ul style="list-style-type: none"> Celebrate Founders Day! 	
MAY	JUNE	
<ul style="list-style-type: none"> Determine if a dues adjustment is needed for the next fiscal year and present to board for a vote if proposing any changes 	<ul style="list-style-type: none"> Set up local dues in memberplanet as a QuickPay charge Review all income and payments from the fiscal year Transition incoming officer (if applicable) Ensure all local dues payments for the fiscal year (checks, cash and any other payment method that is not a memberplanet Quickpay payment) are entered into Anchorbase (Finance > Tasks > Update Paid Local Dues). 	

* Required to be in good standing

Updated 2025

A month-by-month guide to the vp: finance's responsibilities.



2025-26 Alumnae Officer Navigation Guide | vp: finance

Please use this as a guide of tasks and reminders throughout the year.

Year-Round Activities

- Encourage all alumnae officers and members to pay per capita dues directly to the Fraternity
- Pay bills in a timely fashion
- If an item or bill is in question, obtain board approval or review prior to submitting payment
- Keep records on income and payments
- Record local dues payments in Anchorbase (checks, cash, any other payment method that is not a memberplanet QuickPay payment)
- Make regular financial reports to the Executive Board and to the general membership, suggested to be done on a biannual basis
- Maintain a bank account for the group in a federally insured banks or savings and loans institution with either the president or vp: finance authorized to sign checks under \$500.00; both authorized signatures are required for all disbursements in excess of \$500.00
- Complete the Foundation Fundraising Report Form in Anchorbase with the assistance of the vp: Foundation and president no later than two weeks after the date of the fundraising event
- Coordinate with vp: communications to include dues payment recognition, dues asks, expense descriptions and other financial information in newsletters
- Attend board and business meetings as scheduled
- Attend training provided by the region, alumnae leadership and EO

Resources

- [Alumnae Officers Manual](#)
- [Crisis Management Quick Reference](#)
- [Fraternity Constitution](#)
- [Fraternity Standards | Alumnae](#)
- [Schedule of Dues & Fees](#)
- [Rituals Handbook](#)
- [Think Anchor Deep](#)



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Updated 2025

Your Budget

Have on hand:

- Current balance of all accounts as of 7/1/2025
- Number (and level) of local dues-paid members from previous fiscal year
- Previous FY's budget, if available

Best Practices:

- Use last year's actuals as a guide
- Align spending with group goals and AGE Standards
- Monitor monthly to avoid overspending

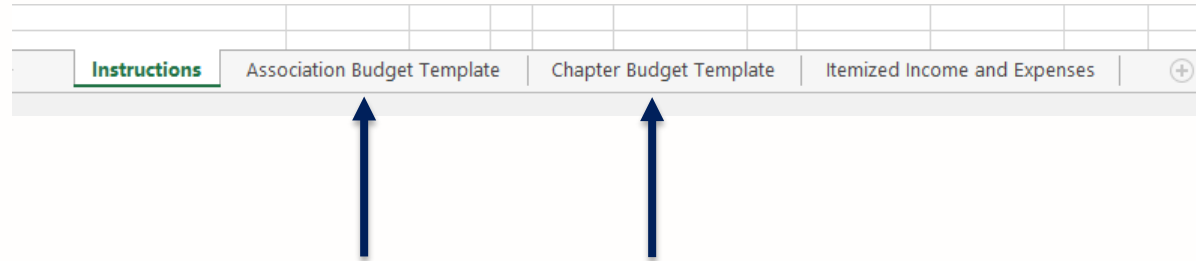
Common Pitfalls to Avoid:

- *Underestimating* Convention delegate travel costs
- Forgetting annual fees or tax deadlines
- *Overestimating* dues income (base on realistic membership)
- Not reserving funds for unexpected costs or leaner years



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*Budget template located in the DG Library.



Delta Gamma Alumnae Group Budgeting Instructions

It can be a challenge to maintain a balanced operating budget that accommodates the needs and goals of a Delta Gamma alumnae group. Local alumnae dues should be able to cover both the Fraternity's financial requirements and local operating expenses. Good financial health directly results in an alumnae group's success.

Things to consider when creating your alumnae group's budget:

- Analyze previous year's expenses to determine a need for additional funds by raising dues
- Use sample budget in Delta Gamma Library to determine fixed expenses and develop an operating budget
- Set your dues to accommodate a fluctuating membership
- Canadian alumnae groups should plan to pay Convention, technology, and insurance fees in USD. The Fraternity annual fee may be paid in CAD, if desired
- Always overestimate operating costs when budgeting
- Implement "bronze", "pink", "blue" graduated dues levels, increasing by \$10-\$25 for each level. Some groups add a "Golden Anchor" level set at \$100
- Offer one year of lower local dues for new college graduates to encourage younger alumnae participation
- Offer one year of lower local dues for first time local dues payers regardless of age to encourage alumnae participation
- Offer lower local dues for alumnae that are 50+ year members
- Use a variety of sample fundraisers at each event for operating expenses: garage sales, raffles, bingo parties (charge \$10 per player with the extra \$5 proceeds going into the group's treasury), pass around a "sunshine box" in which members add \$1 for "good news" they wish to share. Please follow your local state regulations. Many require a raffle license

What operating costs should be considered when developing a budget and setting the amount for local dues?

Fixed dues and fees

The Instructions contain helpful advice on creating a budget and establishing dues.

DELTA GAMMA ALUMNAE BUDGET: Chapter			
Group Name:			
Fiscal Year:	2025-2026		
# of members paid local dues previous FY:	≤50	Use the dropdown arrow to select	
Cash on hand at beginning of budgeted fiscal year (July 1)		\$0.00	
INCOME			
Chapter Local Dues (use for groups with non-tiered dues/only 1 dues price)		\$0.00	
Chapter Local Tiered Dues Level #1		\$0.00	
Chapter Local Tiered Dues Level #2		\$0.00	
Chapter Local Tiered Dues Level #3		\$0.00	
Chapter Local Tiered Dues Level #4		\$0.00	
Total Number of Dues Payers			
	Budget		
Dues		\$0.00	
Member misc income			
Bank interest			
Member income/donations received		\$0.00	
* Non-member income/donations received		\$0.00	
Total Budgeted Income:		\$0.00	

EXPENSES		Due Dates:	
Fixed Expenses:			
FHC Insurance Fee	Due 11/15	\$50.00	
Annual alumnae group fee	Due 11/15	\$58.00	
Technology Fee	Due 11/15	\$45.00	
Annual chapter Convention fee	Due 11/15	\$270.00	
Convention Delegate registration fee (only in even years)		\$200.00	
Required Expenses:		\$623.00	
Panhellenic dues	(if applicable)		
Additional Expenses:		\$0.00	
Operating Expenses:			
Newsletter			
Postage			
Officer expenses			
Printing			

EXPENSES		Due Dates:	
Fixed Expenses:			
FHC Insurance Fee	Due 11/15	\$25.00	
Annual alumnae group fee	Due 11/15	\$34.50	
Technology Fee	Due 11/15	\$30.00	
Required Expenses:		\$89.50	

EXPENSES		Due Dates:	
Fixed Expenses:			
FHC Insurance Fee	Due 11/15	\$50.00	
Annual alumnae group fee	Due 11/15	\$58.00	
Technology Fee	Due 11/15	\$45.00	
Annual chapter Convention fee	Due 11/15	\$270.00	
Convention Delegate registration fee (only in even years)		\$200.00	
Required Expenses:		\$623.00	

Dues

Are more than just setting up a QuickPay charge.

- Core requirement for groups to remain in good standing.
- Cover annual Fraternity/ insurance fees
- Fund Convention delegates for chapters
- Supplement programing costs
... and more
- Ensure your ask meets your group's financial needs
- Reevaluate annually (May)
- Set up charge in June for July 1 launch

“Dues are not just dollars—they’re an investment in sisterhood, service, and sustaining our future.”



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alumnae chapter

\$30.00 - \$60.00

Local Dues 2025-2026

Welcome to the 2025-2026 fiscal year for Delta Gamma. Due to increased costs, the board made the difficult decision to raise dues for the first time since the 2017-2018 fiscal year.

Please renew your membership by paying your local dues at the bronze, pink or blue level for 2025-2026. The link below also includes an opportunity to pay per capita dues, and make additional contributions to the Fraternity, and the Foundation.

Paying your local dues allows alumnae chapter to continue providing our award-winning programming, cherished annual sisterhood events, and meet our financial obligations to the Fraternity.

2025-26 budgeted expenses covered by dues and extra member contributions:

- Fraternity Expenses and Dues (based on chapter size) \$664.00
- Collegiate Chapters Support \$100.00
- Communication (printing and postage) \$2,261.00
- MemberPlanet payment processing fees \$170.00
- Programming and Member Support \$580.00
- Bi-Annual Chapter Convention Fund \$550.00

Total Budgeted Expenses \$4,325.00

Dues waived for the first year following graduation or achieving alumnae status

Click "Pay Now" below to make an easy, secure electronic payment. If you have questions or any trouble with the link please reach out to me at @gmail.com, happy to help.

With gratitude.
ITB,

\$25.00

Local Dues 2025 - 2026

Dear Sister,

My name is and I am excited to introduce myself as the new vp: finance for the alumnae chapter. I am reaching out today to personally invite you to (re)connect with Delta Gamma, because sisterhood doesn't end at graduation.

Our local alumnae chapter has gone through a **REVITALIZATION** this summer, and we have exciting events on the books for the coming year. Joining your local alumnae chapter will give you the opportunity to make meaningful connections, learn something new, or simply connect with sisters in the area.

Joining or renewing your membership is easy. Our local dues are just **\$25 per year**, and here is what they support:

- *Fun and purposeful events throughout the year
- *Chapter communication and administration
- *Strong connection with our local collegiate chapter
- *Fulfilling our obligation to send a representative to the 72nd Biennial Delta Gamma Convention, an important event that connects and strengthens our sisterhood.

We would love to have you with us. Whether you are new to the area, a recent graduate or just haven't been active in a while, this is your invitation to come home to Delta Gamma!

If you would prefer to write a check – please make it out to Delta Gamma Alumni and mail it to . Don't forget to include your first, last and maiden name!

Thank you for considering joining us. I hope to see you at an upcoming event!

In the bonds,

██████████ alumnae chapter
2025 - 2026 Dues

Dear Sister,

My name is ██████████ and I'm thrilled to introduce myself as the new vice president of finance for our alumnae chapter here in ██████████. I want to personally invite you to (re)connect with Delta Gamma, because sisterhood doesn't end at graduation.

Now that you're out of college, you may be looking for meaningful connections, opportunities to give back, or simply a reason to laugh with familiar faces. That's exactly what our alumnae group offers: friendship, support, and a way to stay rooted in the values that brought us all together in the first place.

Joining or renewing your membership is easy. Our local dues are just \$██████ per year, and here's what they support:



Fun and purposeful events throughout the year



Our annual **Founders Day** celebration (our largest expense)



Chapter communications and administration



Fulfilling our obligation to send a representative to the 72nd Biennial Delta Gamma Convention, an important event that connects and strengthens our sisterhood. This will cost between \$1,000 and \$1,500, and the new dues structure helps us plan for it responsibly.

We'd love to have you with us. Whether you're new to the area, a recent graduate, or just haven't been active in a while, this is your invitation to come home to Delta Gamma.

Thank you for considering joining us. I hope to see you at an upcoming event!

ITB,
██████████



The more you know!

Did you know you can send an email by going to Invoices-Manage Quick Pay Charges- select the current charge - then click "Schedule an email about this charge"? From there, you can edit the subject line and email body.

Taxes

Compliance today secures tomorrow.

- Look for the email from Chelsea Simko sent on 9/3/25 with step-by-step instructions.
- **Deadline for filing taxes for your group is 11/15/25** for the 2024 – 2025 year.
- 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, 2025**, in order for Executive Offices to credit you group as having filed for the year.

**“In this world,
nothing can be said
to be certain,
except death and
taxes.”**

- Benjamin Franklin



Alumnae Group Tax Return Preparation Instructions for Fiscal Year 2024-2025

Delta Gamma Fraternity alumnae chapters and alumnae associations are required to file an annual "Federal Tax Return of Organization Exempt from Income Tax".

Which IRS Form to File

- Use IRS Forms for Tax Year 2024.
- The thresholds outlined in the table below are the same as those used last fiscal year.

Gross Receipts	Total Assets	IRS Form	Instructions Located On
\$50,000 or less	Less than \$500,000	990-N	Page 3
Less than \$200,000	Less than \$500,000	990-EZ	Page 5
\$200,000 or greater	\$500,000 or greater	990	Consult a CPA
Investment Income \$1,000 or greater		990-T	Consult a CPA

Filing Deadline

- **November 15, 2025** for the fiscal year ending June 30, 2025.
- To extend your group's filing deadline for Form 990-EZ or 990, submit [Form 8868](#), "Application for Extension of Time To File an Exempt Organization Return or Excise Taxes Related to

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

EXPENSES		Due Dates:	
Fixed Expenses:			
FHC Insurance Fee		Due 11/15	\$50.00
		Due 11/15	\$50.00

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Convention Delegate registration fee (only in even years)		\$200.00	
Required Expenses:			\$623.00

Payments should be made in a timely manner by November 15, 2025. If you have questions, please email alumnaedpt@deltagamma.org for assistance.



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A Word on Insurance

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.**

Helpful Links

- [Alumnae Officer Navigation Guide: Finance](#)
- [memberplanet Success Site](#) (local dues set up)
- [Alumnae Dues Payments Frequently Asked Questions](#)
- [Marking a Member as Local Dues Paid](#) (fees received outside of MP)
- [Alumnae Group Budget Template](#)
- [Fraternity Standards for Alumnae Groups](#)
- [Alumnae Officers Manual](#)
- [Alumnae Group Model Bylaws](#)



**Alumnae
Group
Academy**

Websites

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



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Questions?