

PLANNING FOR THE 2019-20 ACADEMIC YEAR

Ongoing chapter management is an aspect that encourages all members of the Executive Committee to play a continuous part in chapter logistics. Utilizing the tips and chart below, check on what items need to be completed and when they are due. With this chart, in addition to a calendar or schedule of events, as a chapter, you will be able to track what you've completed, what is still ongoing, and what needs to be done to grow the chapter in the future. Preparing now for the future academic year can set the chapter up for success and help encourage continual growth.

ANNUAL MEMBERSHIP DUES (IMPORTANT CHANGES AHEAD!)

At the previous National Convention in Austin, Texas the legislative body voted that there will be a change in dues, taking effect in August 2019. This change impacts both the amount paid and the dates of dues payments. Please review the chart on the next page for these updates.

SUCCESSFUL RECRUITING IN 2019-20

Have you started thinking about recruitment? Planning ahead is the best way to make sure the chapter hosts a successful recruitment season. Start by creating a calendar with the important dates that school has coming up. Does your campus have any days off where students may leave for the weekend? You'll probably want to avoid scheduling events while everyone is gone. Is there a big sporting event coming up? Find a way to tie the recruitment activity into the event - make it a fellowship for people to go hang with the chapter during the game. Schedule out events and share them with chapter members well in advance so they can represent the chapter well during recruitment.

NATIONAL SERVICE WEEK: DIABETES AWARENESS

The National Service Week theme this year is Diabetes Awareness with a specific focus on "Education Awareness on Campus". Partner with local organizations or other groups on campus to raise awareness on the signs and symptoms of diabetes and those impacted by the diagnosis.

2020 NATIONAL CONVENTION: PHOENIX, AZ

Did chapter members travel to Austin for this past National Convention? Something to keep in mind as the year goes on is the cost of attending National Convention. A way to combat this is Convention planning BEFORE the Convention year. By thinking about costs now and planning fundraisers, it will be easier to achieve the goal of making the 2020 National Convention in Phoenix affordable for the entire chapter. Two years seems like a lot of time to start thinking about travel, but it's never too early to start!

CHAPTER BUSINESS CHART (2019-20)

Establishing a calendar is key to proper chapter management and will help keep requirements of the Fraternity and campus organized. Below is a chart of the various reporting items required by the Fraternity that the chapter should have included in their chapter schedule and officer transition materials. (see next page for chart)

ITEM	ITEM DESCRIPTION	DUE DATE	COMPLETED BY
GRADUATING SENIORS LIST	Submit list of graduating seniors for fall and spring semesters in the Officer Portal.	June 1, 2019	Chapter President, Membership VP, Pledgemaster, Treasurer, Secretary
ANNUAL FINANCIAL REVIEW	Submit verification of review of previous year's financial records if not already completed with Charter Reaffirmation. Form available in the Officer Portal.	July 31, 2019	Chapter President, Secretary, Treasurer
PLEDGES	Input new pledges into the Officer Portal and pay \$31 fee (\$25 pledging fee and \$6 insurance fee).	Within 10 Business Days of the Pledge Ceremony	Chapter President, Membership VP, Pledgemaster, Treasurer, Secretary
INITIATES	Input initiates into the Officer Portal and pay \$35 initiation fee.	Within 10 business days of the Initiation Ceremony	Chapter President, Membership VP, Pledgemaster, Treasurer, Secretary
FALL CHARTER REAFFIRMATION & AMD	Review and complete Charter Reaffirmation form in the Officer Portal. Update the membership roster, delete inactive members and pay Active Membership Dues (AMD) for each member - \$20 fee (\$17 AMD and \$3 insurance fee).	No later than Nov. 15, 2019	Chapter President for Charter Reaffirmation, AMDs can be submitted by Chapter President, Membership VP, Pledgemaster, Treasurer, or Secretary
ASSOCIATES	Pay associate insurance fee (\$3).	No later than Nov. 15, 2019	Chapter President, Membership VP, Pledgemaster, Treasurer, Secretary
NATIONAL SERVICE WEEK REPORT	Submit the report for your National Service Week project(s) in the Officer Portal.	No later than Nov. 15, 2019	Chapter President, Membership VP, Service VP, Treasurer
OUTSTANDING DEBTS	Chapters are required to pay any outstanding debts to the National Office. Chapters can determine if they have any debts in the Dashboard section of the Officer Portal.	Nov. 15, 2019; ongoing	Chapter President, Membership VP, Pledgemaster, Treasurer, Secretary
CHAPTER OFFICERS LIST	Update current officer listing in the Officer Portal after officer transition.	After each election	Chapter President, Membership VP, Pledgemaster, Secretary
MAINTAIN 501(C)(3) NOT-FOR-PROFIT STATUS	Chapters not filing under the school, must file the 990-N e-Postcard once per year. Check the Chapter Dashboard in the Officer Portal to determine specific due dates.	By the 15th day of 5th month of chapter's tax year	Chapter President, Treasurer
CHARTER REAFFIRMATION & AMD	Review and complete Charter Reaffirmation form in the Officer Portal. Update the membership roster, delete inactive members and pay Active Membership Dues (AMD) for each member - \$20 fee (\$17 AMD and \$3 insurance fee).	No later than April 15, 2020	Chapter President for Charter Reaffirmation, AMDs can be submitted by Chapter President, Membership VP, Pledgemaster, Treasurer, or Secretary
ASSOCIATES	Pay associate insurance fee (\$3).	No later than April 15, 2020	Chapter President, Membership VP, Pledgemaster, Treasurer, Secretary
CHAPTER BYLAWS	Submit copy of revised chapter bylaws within the Charter Reaffirmation and upload revisions through the Officer Portal.	Immediately after revision	Chapter President, Membership VP, Service VP, Secretary
SPRING YOUTH SERVICE DAY REPORT	Submit the report for your Spring Youth Service Day project in the Officer Portal.	May 1, 2020	Chapter President, Membership VP, Service VP, Secretary
GRADUATING SENIORS LIST	Submit list of graduating seniors for fall and spring semesters in the Officer Portal.	June 1, 2020	Chapter President, Membership VP, Pledgemaster, Treasurer, Secretary
ANNUAL FINANCIAL REVIEW	Submit verification of review of previous year's financial records if not already completed with Charter Reaffirmation. Form available in the Officer Portal.	July 31, 2020	Chapter President, Secretary, Treasurer