



DELTA CHI

FRATERNITY

“D” – Treasurer

First 60-Days Checklist

Congratulations on your new role as the “D”! Thank you for your commitment to Delta Chi and the success your chapter. While this is not an exhaustive list to govern your entire term, it can get you started on the tasks you will need to complete during your first 60 days in office.

IMPORTANT DATES

Below is a list of important dates. You should save these in your phone, your computer or write them in your agenda.

- **April 30:** “BB” should submit the Semi-Annual Report and the “C” should update the status of the seniors who graduated (see [“C” Reference Guide](#) for more detail)
- **May 15/November 15:** “D” should file your 990 Form

FINANCIAL BREAKDOWN

Below is a list of all fees and what they are associated with. Please pay special attention to the following items:

- Associate Member Dues are **\$100.00** per person
- Initiation Dues are **\$205.00** per person
- Alumni Initiation Dues are **\$205.00** per person, but this initiation deposit can be waived upon special request, in writing to the Executive Director
- Fall and Spring Member Dues are **\$68.00** per person
- Fall and Spring Housing Initiatives are **\$10.00** per person
- The Risk Management Assessment is currently at a base rate **\$260.00**. This typically increases by 10% each year. Plan to budget for **\$290.00** for the 2021-22 academic year. The chapter will be billed **60%** of their rate in the fall and **40%** in the spring. The final rate for each chapter will be communicated as soon as it is decided by the insurance company.

TRANSITION WITH THE OUTGOING “D”

- Complete the “D” On-Boarding tutorial on [Lessonly](#) (available Fall 2020)
- Read the [Financial Management BRIEF](#)

- Analyze account balances, budgets and cashflow from the previous three years.
- Collect records, IRS 990 report, and other paperwork from the outgoing "D".
- Complete the [Incoming Officer Guide](#)
- Use the [1:1 Officer Transition Meeting Guide](#) as an agenda when meeting with the outgoing officer
- Attend the incoming officer retreat with the new Executive Board to prepare for the year

REGISTER FOR LEADERSHIP PROGRAMMING SPONSORED BY IHQ

- Register for the Regional Leadership Conference (RLC)
 - Log into MYDCHI
 - Complete the required steps under "RLC Registration" and register for the "D" Track

REVIEW THE CHAPTER'S STATUS

- Obtain and review copies of your chapter's current:
 - Constitution and By-Laws
 - Action Plans, Goals, and SWOT analysis
 - Budget
 - Chapter Event Calendar, Campus Academic Calendar, and Activities Calendar
 - Membership Roster on Vault [Chapter's Vault page > Vault Mgt > Chapter Mgt > Member Roster]
 - If applicable, any current corrective action plans for the institution, IFC or Delta Chi.
- Confirm your chapter is in good standing financially with the International Headquarters, the IFC, and any other campus board/council (All Greek Programming Board, Greek Council, Student Government Association, etc.).
- Make changes to the primary account holder information for the checking account at the bank. Ensure that an ABT member is listed as an authorized user on this account.

MEET WITH YOUR CONTACTS

Though these are recommendations for initial touchpoints, you should consistently interact with these stakeholders throughout your officer term.

- Contact your “BB”
 - Set up a time to meet/talk in the next two weeks
 - Review your position description and set expectations together
 - Set up a time and method for communication

- Contact your Housing Corporation President (if applicable)
 - Set up a time to meet/talk in the next two weeks
 - Review your position description and set expectations together
 - Review any outstanding balances, in conjunction with the House Manager and “A”; establish clear payment deadlines
 - Set up a time and method for communication as appropriate

- Contact your Alumni Board of Trustees Advisor (if applicable)
 - Set up a time to meet/talk in in person in the next two weeks
 - Review your position description and set expectations together
 - Set up a time and method for ongoing communication

- Introduce yourself to current sorority chapter presidents, other fraternity chapter presidents not in IFC, Governing Council Officers, and leaders of other campus organizations with whom you will work with on a regular basis.

- Contact your [Regent](#) to introduce yourself

THINGS TO CONSIDER

- Review additional [Officer Resources](#)
- Review any campus fraternity/sorority life standards or awards programs
- Review the [fees and bills due](#) to Delta Chi International Headquarters
- Review Tax Filing Deadlines
- Learn about the [Emerging Leaders Academy](#) • Learn about the [Delta Chi Associate Member Program](#)