

DELTA CHI

FRATERNITY

60 DAY CHECKLIST: “D” - TREASURER

Congratulations on your role as the “D”! Thank you for your commitment to Delta Chi and the success of your chapter/provisional chapter. This is not an exhaustive list to govern your entire term, but it will help you get started during your first 60 days in office - typically from your election until attending your Regional Leadership Academy event.

IMPORTANT DATES

In addition to all of the Delta Chi [Operational Dates and Deadlines](#), here are some items to get added to your calendar now, as they will be your responsibility as the “D” to ensure the chapter is aware and follows:

- January 15: International Convention Assessment and Regional Leadership Academy (RLA) Assessment billed.
- February 5: RLA Travel Credits posted to accounts (if applicable).
- February 12: Sexual Misconduct Prevention [Risk Management Webinar](#)
- February 15: International Convention and RLA assessments due.
- February 15: Spring term Risk Management Assessment (RMA), Membership, and Housing Fees billed.
- March 15: Spring term RMA, Membership, and Housing Fees due.
- September 5: Convention Travel Credits posted to accounts (if applicable, even years only).
- September 15: Fall term RMA Fees billed (semester schools), due October 15
- October 1: Fall term RMA Fees billed (quarter schools), due November 1
- October 15: Fall term Membership and Housing Fees billed.
- November 13: Sexual Misconduct Prevention [Risk Management Webinar](#)
- November 15: Fall term Membership and Housing Fees due.
- Check for [tax filing deadline](#) based on the fiscal year of the chapter.

GETTING STARTED

As you transition into your officer role, here’s a few checklist items you will need to complete:

- Check current account balances for checking, savings, and miscellaneous accounts (housing fund, chapter/provisional chapter scholarship fund, OmegaFi Bill Pay, etc.).
- Make changes to the primary account holder information for the chapter/provisional chapter checking account at the bank. Ensure that an ABT member is also listed as an authorized user on this account.
- Review the [Schedule of Dues](#) and the [Chapter Finance Guide](#).
- Register to attend your [Regional Leadership Academy](#) in January.
- Complete the Preparing to be an Officer, Cultural Competency, and the “D” Onboarding modules, found in the MyDCHI Learning Management System.
- Schedule a transition meeting with the outgoing “D.”
- Introduce yourself to important contacts, such as: ABT Financial Advisor, Housing Corporation (if applicable), your [Regent](#), International Headquarters Staff ([including your chapter coach](#)), Fraternity/Sorority Life Advisor, and Interfraternity Council (IFC) Finance Officer.
- Review the Delta Chi Risk Management Policy, Delta Chi Law, and the “D” officer resources and BRIEFs.
- Get updated copies of institutional policies (including a Code of Conduct), campus academic and activity calendars, and student organization expectations.
- Review your local chapter/provisional chapter Constitution and Bylaws, membership roster, Membership Experience Survey report, action plans and goals, budget, and calendar.