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ALPHA SIGMA PHI FRATERNITY
VP OF FINANCE
GUIDEBOOK



ACADEMY SCHEDULE

SOCIETY #1
SOCIETY #2
SOCIETY #3
SOCIETY #4
SOCIETY #5
SOCIETY #6
SOCIETY #7
SOCIETY #8
SOCIETY #9
SOCIETY #10
SOCIETY #11
SOCIETY #12

SETTING THE STAGE & FRATERNITY FEE STRUCTURE
SATURDAY, JANUARY 16, 2021 // 12 P.M. - 2 P.M. ET

MEMBERSHIP STATUSES & COLLECTING MONEY
SATURDAY, JANUARY 16, 2021 // 3:30 P.M. - 5 P.M. ET

REVENUE & EXPENSES
SUNDAY, JANUARY 17, 2021 // 12 P.M. - 2 P.M. ET

VAULT TRAINING & RESOURCES
SUNDAY, JANUARY 17, 2021 // 3:30 P.M. - 5 P.M. ET

PROTECTING AGAINST FRAUD
WEEK OF JANUARY 31, 2021 // TIME VARIES BASED ON SOCIETY

FUNDRAISERS & ENDOWMENTS
WEEK OF FEBRUARY 28, 2021 // TIME VARIES BASED ON SOCIETY

BUDGET RECONCILIATIONS & BUDGET REQUEST FORMS
WEEK OF APRIL 4, 2021 // TIME VARIES BASED ON SOCIETY

SEMESTER DEBRIEF & FALL BUDGETING
WEEK OF MAY 2, 2021 // TIME VARIES BASED ON SOCIETY

TAXES & UTILIZING YOUR RESOURCES
WEEK OF AUGUST 1, 2021 // TIME VARIES BASED ON SOCIETY

DEALING WITH ADVERSITY
WEEK OF SEPTEMBER 5, 2021 // TIME VARIES BASED ON SOCIETY

FINANCIAL ASSESSMENT
WEEK OF OCTOBER 3, 2021 // TIME VARIES BASED ON SOCIETY

SEMESTER DEBRIEF & SPRING BUDGETING
WEEK OF NOVEMBER 7, 2021 // TIME VARIES BASED ON SOCIETY



EXPECTATIONS

ATTENDANCE

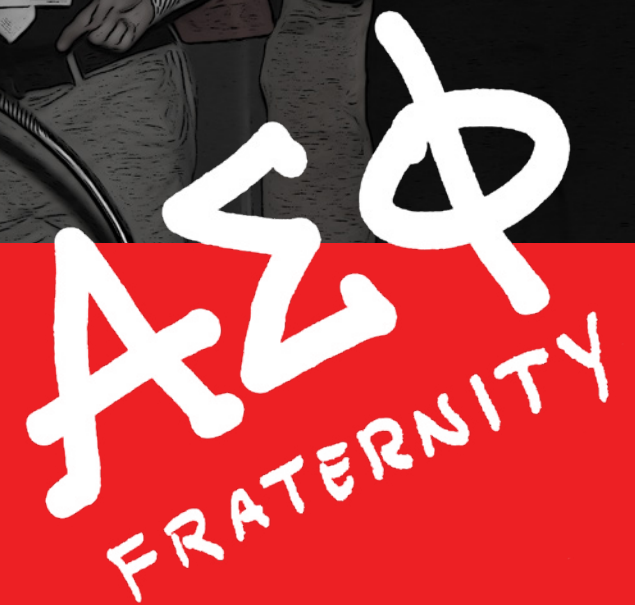
- Attend all societies = Points on the Annual Report for Accreditation. Bring workbook, a pen and paper to all societies.
- Non-attendance = Loss of points on the Annual Report for Accreditation + \$100 charge per society missed (Please note that five minutes late or leaving more than five minutes early is considered a missed society).
- Video should be on during the entirety of the society with name and college/university; officer should be on a laptop/tablet, not on a phone.

ATTIRE

- Wear a collared shirt and badge. Hats are not permitted.

PRE-WORK

- By January 10, 2021, the Vice President of Growth completes Phired Up Certification (Note: All other H-officers should complete to receive the discount as outlined in the billing letter).
- By January 10, 2021, the following officers complete online officer training on MyAlphaSig: President, Vice President of Retention, Vice President of Finance, and Vice President of Ritual and Traditions.



FOLLOW ALPHA SIGMA PHI ON SOCIAL MEDIA!



STAFF DIRECTORY

Click on the staff member's name to send an email.

317.843.1911
tbtm@alphasig.org

EXECUTIVES

GORDY HEMINGER
PRESIDENT & CEO

MATT HUMBERGER
VICE PRESIDENT & COO

HEALTH & SAFETY

DANNY MILLER
SENIOR DIRECTOR OF PREVENTION & ACCOUNTABILITY

INITIATIVES

TABATHA SARCO
SENIOR DIRECTOR OF STRATEGIC INITIATIVES

MARKETING & COMMUNICATIONS

IAN FRASER
DIRECTOR OF MARKETING & COMMUNICATIONS

BUSINESS OPERATIONS & MEMBER SERVICES

ADAM BROWN
DIRECTOR OF BUSINESS OPERATIONS

BRETT CARLSON
ASSISTANT DIRECTOR OF MEMBER SERVICES

SARAH SNYDER
MEMBER SERVICES SPECIALIST

PROVISIONAL CHAPTER DEVELOPMENT

SAM FRANZOIA
DIRECTOR OF PROVISIONAL CHAPTER DEVELOPMENT

DAVID ERON
ASSISTANT DIRECTOR OF PROVISIONAL CHAPTER DEVELOPMENT

CLVEN HOUSING

NICK MILLER
DIRECTOR OF CLVEN HOUSING

BENNY ARGENTO
ASSISTANT DIRECTOR OF CLVEN HOUSING

STEVEN NORRIS
ASSISTANT DIRECTOR OF CLVEN HOUSING

NICK STEPANIAK
ASSISTANT DIRECTOR OF CLVEN HOUSING

FOUNDATION

SAMIR HAFIZ
DIRECTOR OF FOUNDATION

ALUMNI ENGAGEMENT

JEREMY RIED
SENIOR DIRECTOR OF ALUMNI ENGAGEMENT & CHAPTER OPERATIONS

LOGAN ISHIMINE
DIRECTOR OF SOUTHEAST OPERATIONS

LAYTON PIVER
DIRECTOR OF WEST COAST ENGAGEMENT

ADAM STAHON
DIRECTOR OF MIDWEST OPERATIONS

EXPANSION & GROWTH

ANDREW BREMER
DIRECTOR OF FRATERNITY INITIATIVES

MIKE CARLO
DIRECTOR OF EXPANSION

JACK WHITSITT
ASSISTANT DIRECTOR OF GROWTH

ANTHONY COPES
COORDINATOR OF EXPANSION

ADRIAN CULP
GROWTH COACH

ALEX HILE
COORDINATOR OF EXPANSION

JACOB LENAMOND
GROWTH COACH

MATT LIGHTNER
COORDINATOR OF EXPANSION

MASON PATRICK
GROWTH COACH

ASHER ROGERS
COORDINATOR OF EXPANSION

CHRIS SLATER
GROWTH COACH

DYLAN WOLFORD
GROWTH COACH

AVAILABLE RESOURCES

Alpha Sigma Phi encourages you to use our resources throughout the year to help navigate your position within the chapter and to be as efficient as possible. The Fraternity offers video resources that can be found on our YouTube page, as well as PDF resources that can be found on our website.

Click the icons below to view our available resources.

VIDEO RESOURCES



PDF RESOURCES



Write the name of your facilitator:

THE JOB DESCRIPTION

Once you've reviewed the job description of the VP of Finance, list the three responsibilities you think are the most important to the success of your chapter. Then, list the three responsibilities you think are least important.

MOST IMPORTANT

LEAST IMPORTANT

WHAT ARE SOME THINGS EXPECTED OF THE VP OF FINANCE IN YOUR CHAPTER?

RETURN ON INVESTMENT

Identify 10 ways to provide value to each of the three groups of members listed below.

NEW MEMBER

SOPHOMORE

JUNIOR/SENIOR

NEW MEMBER	SOPHOMORE	JUNIOR/SENIOR

FRATERNITY FEE STRUCTURE

The following fees are billed to the chapter annually. Document the fee for each and write a description for each.

EDUCATIONAL PROGRAMMING FEE

MEMBERSHIP FEE

HEALTH & SAFETY FEE

HOUSING FEE

EXTRA SPACE FOR NOTES

MEMBER STATUSES

Document the four membership statuses of Alpha Sigma Phi. Then, acknowledge the sample language provided below to include in your chapter's Constitution & Bylaws.

ARTICLE X. MEMBERSHIP AGREEMENT

- Individuals who voluntarily join Alpha Sigma Phi understand there is no "inactive" status or "early alum" status. Members cannot voluntarily quit/drop/turn in badge. Members are responsible for all financial obligations as long as they are enrolled at university, regardless of their level of participation.

EXTRA SPACE FOR NOTES

BILLING MEMBERS

Answer the following questions:

HOW DO YOUR MEMBERS KNOW WHEN TO PAY?

HOW DO YOUR NEW MEMBERS KNOW WHEN TO PAY?

WHAT HAPPENS IF A NEW MEMBER DROPS? WHAT DOES HE PAY? WHAT REFUNDS ARE AVAILABLE IF HE'S PAID IN FULL?

WHAT DO YOU BILL SUSPENDED MEMBERS?

DO YOU OFFER ANY DISCOUNTS FOR THOSE THAT PAY EARLY? IN FULL? SENIORS?

COLLECTING FROM MEMBERS

Brainstorm ways to collect dues from members.

INCENTIVES VS CONSEQUENCES

List five incentives to get members to pay dues on time. Then, list five consequences you can utilize if members do not pay dues on time.

COLLECTIONS

Document the information you'd need from your members.

CASE STUDY

Read the following case study and answer the question below.

In preparation of the semester, you built a very strong budget accounting for all of the expenses the chapter anticipates for the year and accurately accounted for all members of the fraternity. You put all of these members on one of two payment plans, monthly installments or a one-time payment. One of your members, Chase, has yet to make any of his monthly payments three months into the semester. When you have approached him about this, he tells you that he's no longer able to make the payments happen and won't be active this semester. You know that he has been coming to events throughout the semester thus far and have seen him going to the bars on multiple occasions.

WHAT ARE THE STEPS YOU'D TAKE TO SOLVE THIS ISSUE?

FIXED & VARIABLE EXPENSES

Define 'fixed expense.' Then, list examples of fixed expenses.

A FIXED EXPENSE IS...

Define 'variable expense.' Then, list examples of variable expenses.

A VARIABLE EXPENSE IS...

VARIABLE EXPENSES ACTIVITY

Use the space below to develop a preliminary spring calendar of brotherhood events. Focus primarily on the budget for these events.

FUNDING PRIORITIES ACTIVITY

Write down what you think are the top 5 funding priorities of a successful chapter.

BUDGETING REVENUE

Use the space below to describe your method of budgeting, and the pros and cons of that method.

MY METHOD	PROS	CONS

TAXES

Chapters can fall into one of three categories. Put a check next to which criteria your chapter falls.

- A 990N group is any group that has gross receipts below \$50,000. Gross receipts means the amount of money brought in from July-June. This includes dues, fundraisers, and rent if paid to chapter.
- 990EZ groups are between \$50k and \$200k.
- Full 990's are above \$200k.

VAULT TRAINING

Name the two different rosters available in Vault. Then, jot down a short description for each.

Use the allotted space to take notes during Vault training.



OMEGAFI®

EXTRA SPACE FOR NOTES

REMINDER REGARDING OUR NEXT SOCIETY:

PROTECTING AGAINST FRAUD - ACTIVITY

Brainstorm policies and practices that you believe can protect your chapter against fraud. Be prepared to share.

PEER TO PEER PAYMENTS

Document the issues you've run into with peer to peer payment options such as Venmo.

EXTRA SPACE FOR NOTES

REMINDER REGARDING OUR NEXT SOCIETY:

FUNDRAISING

Create a fundraising idea, budget and marketing plan.

<p><u>IDEA</u> What is the idea?</p>	
<p><u>BUDGET</u> How much will it cost the chapter? How much money are you estimating to bring in?</p>	<p><u>MARKETING</u> Who's your target audience? How will you market to them?</p>

CROWDCHANGE

Use the space provided to take notes on CrowdChange. A link to Alpha Sigma Phi's CrowdChange is provided for more information.

ENDOWMENTS

What's the difference between a permanent endowment and a temporary endowment? Use the space provided to describe each.

<p>PERMANENT ENDOWMENT</p>
<p>TEMPORARY ENDOWMENT</p>

EXTRA SPACE FOR NOTES

visit alphasigmaphi.crowdchange.co to get started!

SEMESTER DEBRIEF

Use the space below to identify 5-10 wins your chapter had this semester. Then, identify 5-10 challenges your chapter faced this semester.

WINS

CHALLENGES

FALL BUDGETING

Answer the following questions and discuss with your society members.

HOW FAR IN ADVANCE DO YOU TYPICALLY PLAN THE NEXT TERM'S BUDGET?

WHAT DOES YOUR BUDGET REQUEST PROCESS LOOK LIKE?

WHEN DO YOU NOTIFY THE CHAPTER REGARDING DUES?

WHEN DO YOU START COLLECTING?

EXTRA SPACE FOR NOTES

REMINDER REGARDING OUR NEXT SOCIETY:

TAXES

Reference back to Page 11 to see which of the three categories your chapter falls under. Use the space provided to take notes during the discussion.

SETTING YOUR CHAPTER UP FOR SUCCESS

Make a list of all the things you think the VP of Finance should have done prior to the start of a new term.

EXTRA SPACE FOR NOTES

REMINDER REGARDING OUR NEXT SOCIETY:

RESILIENCY THROUGH ADVERSITY

Define 'resiliency.' Then, read through the Five Ways to Build Resiliency on the right.

RESILIENCY IS...

MAKE CONNECTIONS

This is about having people to go to that serve as resources and can assist you.

AVOID SEEING CRISES AS INSURMOUNTABLE PROBLEMS

You can't change the fact that something happened, but you can change how you respond.

MOVE TOWARDS YOUR GOALS

Make smaller goals that work towards the bigger picture and do not let one thing derail you!

TAKE DECISIVE ACTIONS

Detaching and trying to ignore the problem does not rid you of the problem!

KEEP THINGS IN PERSPECTIVE

Don't blow the event out of proportion. Consider the broader context even when dealing with a stressful situation.

In the space below, come up with an example scenario for a type of adversity you have or could face in the chapter. Then, describe how you'd like to respond to that scenario's adversity. Finally, describe how you'd avoid that scenario from happening again. Consider how you'd use the Five Ways to Build Resiliency.

EXAMPLE SCENARIO

RESPONSE TO SCENARIO/ADVERSITY

HOW TO AVOID FROM HAPPENING AGAIN

EXTRA SPACE FOR NOTES

EXTRA SPACE FOR NOTES

REMINDER REGARDING OUR NEXT SOCIETY:

ASSESSMENT

Complete the Financial Assessment below.

What percentage of members have not made any payments this term?	
What percentage of members are not current on their payments?	
What percentage of dues have you collected this term?	
What's your total outstanding past due balance? What actions are you taking to lessen this amount?	
Are you up-to-date on Fraternity fees?	
Are all bills paid that are due to this point (including composite, IFC, etc...)?	
Have you put money into savings this term? How much?	
Has your chapter put money aside for Fraternity programs and/or Phi Society?	
Are your new members on track to make all of their payments on time?	

EXTRA SPACE FOR NOTES

Large empty space for notes.

REMINDER REGARDING OUR NEXT SOCIETY:

SEMESTER DEBRIEF

Use the space below to identify 5-10 wins your chapter had this semester. Then, identify 5-10 challenges your chapter faced this semester.

WINS

CHALLENGES

SPRING BUDGETING

Answer the following questions and discuss with your society members.

HOW FAR IN ADVANCE DO YOU TYPICALLY PLAN THE NEXT TERM'S BUDGET?

WHAT DOES YOUR BUDGET REQUEST PROCESS LOOK LIKE?

WHEN DO YOU NOTIFY THE CHAPTER REGARDING DUES?

WHEN DO YOU START COLLECTING?

EXTRA SPACE FOR NOTES

REMINDER REGARDING OUR NEXT SOCIETY:



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