



FIJI ACADEMY

St. Louis, MO | January 7-9, 2022

Treasurer Workbook



PHI GAMMA DELTA

BUILDING COURAGEOUS LEADERS


Phi Gamma Delta International Headquarters

1201 Red Mile Road, Lexington, KY 40504


859-255-1848 | www.phigam.org | phigam@phigam.org

 Phi Gamma Delta

 PhiGamHQ

 Phi Gamma Delta

 PhiGamHQ

 PhiGamHeadquarters

Agenda

Saturday, January 8, 2022

- 8:30 a - 10:00 a:** Opening Session: Discussion About Hazing Prevention & Awareness
- 10:00 a - 11:00 a:** Building Courageous Leaders: End All Hazing
- 11:00 a - 11:30 a:** Break
- 11:30 a - 12:30 p:** Using the Dyad Survey Data
- 12:30 p - 2:00 p:** Scholarship Luncheon
- 2:00 p - 3:00 p:** Risk Management & Internal Accountability
- 3:00 p - 4:00 p:** Common Problems
- 4:00 p - 5:00 p:** LegFi/OmegaFi Presentation
CrowdChange
- 5:30 p - 5:30 p:** Breakout Groups

Facilitators

Jarrett Keyton (Mississippi State 2020), Field Secretary
[*jkeyton@phigam.org*](mailto:jkeyton@phigam.org)

Emily Sledd, Director of Chapter Services - West
[*esledd@phigam.org*](mailto:esledd@phigam.org)

The Courageous Leader Framework



There are three elements of Courageous Leadership:

- Understanding and committing to Phi Gamma Delta's values: Friendship, Knowledge, Service, Morality and Excellence.
- Recognizing the testing points - times when your values are challenged.
- Applying the values at the testing point and confronting the issue.

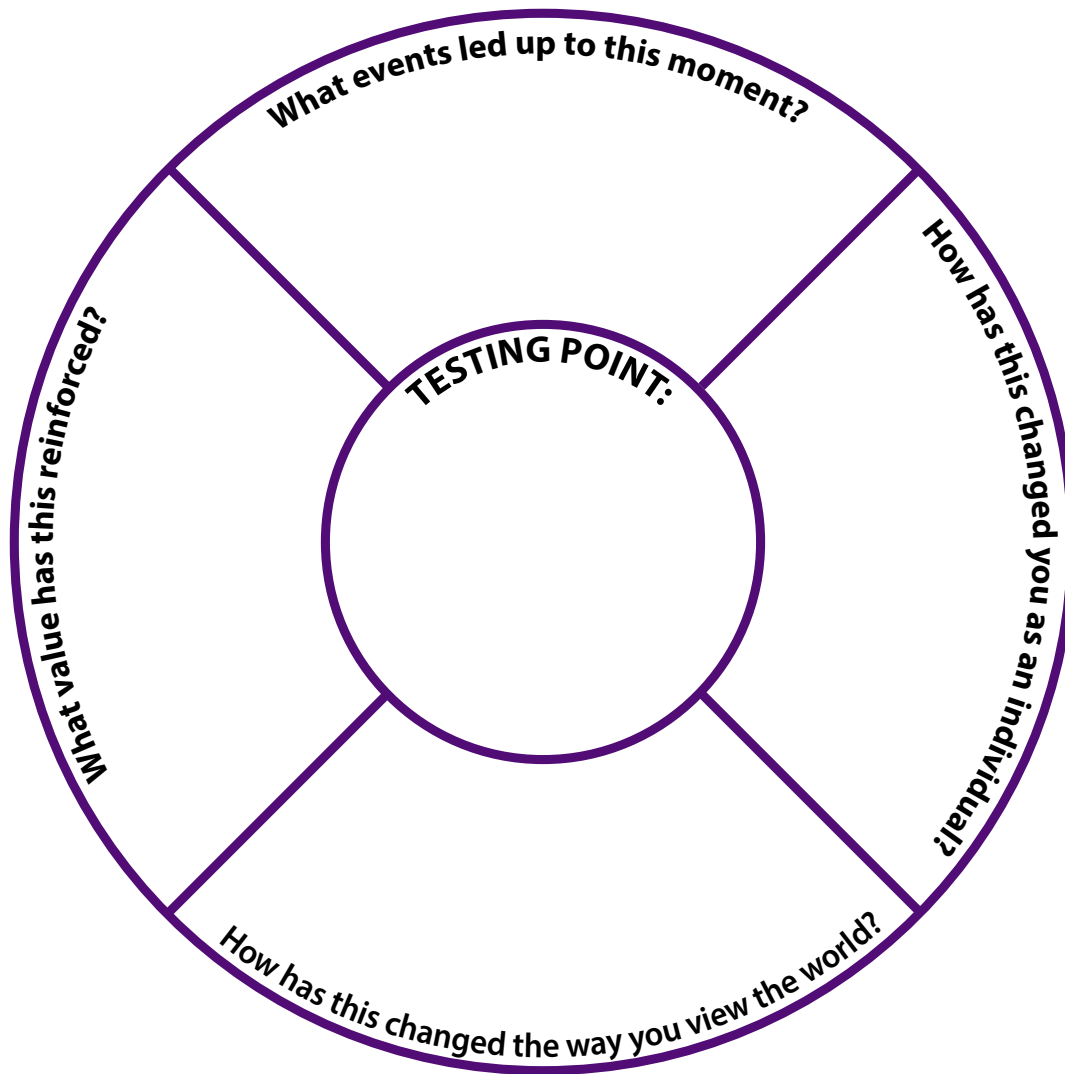
Courageous leaders have the strength to stand up for their values when they are tested.

What is a testing point? A situation when your values are challenged and there are repercussions to the choices you make. There are four types of testing points.

Stance	Intervention	Opportunity	Accountability
The courage to publicly profess your values, beliefs or opinions, especially when in the minority. These testing points pose risks associated with speaking out or expressing a contrary opinion.	Courageously embracing risk to actively stop or prevent an event or behavior. These testing points offer the potential to positively change the course of history.	Courageously embracing risk to create, start or support something new and untested. These testing points pose the same risks all entrepreneurs learn to face with courage.	The courage to take personal responsibility for past actions or futures commitments. These recurring testing points - both big and small - form the foundation of integrity.
<i>Ex: Speaking up when hearing a racist joke, or voicing your opinion in class.</i>	<i>Ex: Intervening to stop a dangerous tradition even though your action might prove unpopular at the time.</i>	<i>Ex: Seeing the opportunity to address sexual assault and pro-actively creating or supporting a new campus event to raise awareness.</i>	<i>Ex: Taking ownership for a failure or mistake or honoring your commitment to attend a chapter meeting.</i>

Brotherhood Survey

Testing Points



Brotherhood

Solidarity

Sense of connection based on commitment to mutual assistance

Shared Social Experience

Fraternity is primarily a social outlet

Belonging

Members view brothers as family; a "home away from home"

Accountability

Brothers held accountable to group standards and expectations

Brothers Don't Pay Their Dues

Notes

- Is this a problem in your chapter?
- What do you/your chapter do now to help with this problem? Both incentives and consequences. Are they working?

Poor/Ineffective Transitions

Notes

- Did you have a transition into your role, or established process for transitions in your chapter?
- What was helpful? What wasn't necessary? What could be better?

Graduates Don't Pay/Donate

Notes

- Does your chapter still have brothers who owe dues, even though they have graduated? What are some ways that we can encourage them to settle their debt?
- How often do graduates donate to the chapter? What are additional ways to recruit donors?
- Who can help us with these problems (graduate and undergraduate)?

Common Problem:

Notes

Common Problem:

Notes

Tools Available:

LegFi / OmegaFi

CrowdChange

Breakout Group:

Notes

Breakout Group:

Notes



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Mandatory Forms & Fees

The following information is intended to aid Chapter / Colony Treasurers in budgeting.
Contact Amy Watson, Director of Membership & Operations, with questions at 859-255-1848.

Fees & Penalties:

Annual Membership Dues*:

\$115.00 per initiated brother. An e-mail invoice will be issued in late September. There is no exemption or reduction for fifth-year seniors. * (The deadline for roster updates is **Friday, September 17, 2021.**)

Initiation Fee*:

\$210.00 per new initiate. Initiations should be reported through the [Fraternity's website](#). Initiation fees should be collected from individuals prior to their initiation and paid to International Headquarters with a single chapter check or online payment. A 10% late penalty is assessed for initiates reported and/or fees paid more than 30 days after initiation.

First Year Dues*:

\$57.50 per new initiate. This amount should be added to the initiation fee.

New Member Fee:

\$75.00 per new member. New members must register at www.phigam.org/NewMemberReg; and fees paid at that time. A 10% late penalty is assessed for new members reported and/or fees paid more than 15 days after pledging.

Liability Insurance:

Amount varies annually. Invoices will be emailed prior to March 1 renewal. The charge per brother/new member is dependent upon annual renewal rates determined by the insurance carrier; please budget **\$180 per man**. There is no exemption or reduction for fifth-year seniors. (Roster update deadline is **Friday, January 31, 2022.**)

Finance Charge:

A **1% charge** is assessed monthly on all amounts owed to the Fraternity that are more than 60 days past due.

End of Year Penalty:

A **10% charge** is assessed on all amounts owed to the Fraternity that are 60 days past due on June 30.

Payment Methods:

- Mailed check to P.O. Box 4599, Lexington, KY 40544-4599
- Debit or credit card, click [here](#).
- ACH payment transfer. Call IHQ for account information.
- Zelle payment application. Use awatson@phigam.org to locate account.

**Applies to Chapters only*

Other Fees & Assessments

Academy Registration Fees:

\$1,500 annually. An email invoice will be issued to each chapter/colony.

Financial Forms & Reports:

Annual Budget:

The chapter or colony budget (in any form) is due at Headquarters on or before September 30.

Annual Financial Report:

This report is due at Headquarters on or before September 30.

Report of Annual Financial Review (Audit):

This report is due at Headquarters on or before October 31.

IRS Form 990:

This is due to the IRS on 15th day of the 5th month after the Chapter or colony's accounting period ends (*usually November 15*).

To view the Mandatory Forms & Fees PDF online, visit: www.phigam.org/file/mandatoryfees.pdf.



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