

# A YEAR IN THE LIFE OF A BETA CHAPTER

## LEADERSHIP DEVELOPMENT OPPORTUNITIES

### WOODEN INSTITUTE, WINTER – Registration Deadline: Dec. 15, 2018

January 3-6, 2019 Winter Session Oxford, Ohio

### PRESIDENTS ACADEMY – Registration Deadline: Dec. 15, 2018

January 11-13, 2019 Chapter/Colony Presidents Cincinnati, Ohio

### KEYSTONE CONFERENCE – Registration Deadline: Jan. 20, 2019

February 8-10, 2019	Northwest	Seattle, Wash.
February 8-10, 2019	Southeast	Jacksonville, Fla.
February 15-17, 2019	North Central	Itasca, Ill.
February 15-17, 2019	South Central	Tulsa, Okla.
February 22-24, 2019	Northeast	Cherry Hill, N.J.
February 22-24, 2019	Southwest	Irvine, Calif.

### WOODEN INSTITUTE, SUMMER – Registration Deadline: April 15, 2019\*

June 1-5, 2019	Session One	Oxford, Ohio
June 8-12, 2019	Session Two	Oxford, Ohio
June 22-26, 2019	Session Three	Oxford, Ohio
June 29 - July 3, 2019	Session Four	Oxford, Ohio

### 180TH GENERAL CONVENTION – Registration Deadline: June 26, 2019\*

August 1-4, 2019 Leadership College/Legislation Oxford, Ohio

\* Final registration deadline; early-bird pricing ends April 15 (date is approximate).

## Financial Dates

July 31 ..... Semester schools billed for insurance, fall dues and heritage fees  
 August 31 ..... Quarter schools billed for insurance, fall dues and heritage fees  
 October 1 ..... Semester schools roster adjustments deadline for refunding fees  
 October 15 ..... Quarter schools roster adjustments deadline for refunding fees  
 December 31 ..... All schools billed for insurance, spring dues and heritage fees  
 February 28 ..... All schools billed for convention delegate  
 March 1 ..... All schools roster adjustments deadline for refunding fees  
 April 15 ..... Chapter Accounting Standards selection deadline  
 May 1 ..... Report graduating seniors on roster maintenance  
 July 31 ..... All fees and assessments must be paid

- If payment in full is not received within 30 days of the billing date, a delinquent chapter will incur the standard finance charge of 1.5% per month [Chapter X, Section 2 of The Code]. **Exception: dues, heritage fees and insurance fees are billed early on July 31** (August 31 for quarter schools) and December 31 to allow for adequate chapter planning, but are not due for 60 days.
- Keystone Conference fees are billed in \$215 installments from August 31 to March 31 for eight officer registrations.
- File Form 990 with the IRS by the 15th day of the fifth month following a chapter's fiscal year end.



## REPORTING REMINDERS

- Maintain up-to-date membership and officer rosters, as changes occur.
- Register all pledges within 72 hours of joining – either the first pledge function (ceremony, meeting, orientation, etc.) or moving into the chapter house.
- Report all initiations online within 72 hours of the ceremony.
- Report all potential risk management incidents within 24 hours.
- Authorized chapter officers for online reporting include president, vice president, treasurer, secretary, pledge educator and recruitment chairman.

## ONLINE REPORTING DATES

### MARCH 1

- ▶ Fall Grade Report due

### MARCH 15

- ▶ Winter End-of-Term Report due (Quarter schools)

### APRIL 1

- ▶ Summer Magazine Report due
- ▶ Donate to Sons of the Dragon Club

### APRIL 15

- ▶ Men of Principle Scholarship Grant application due
- ▶ Foundation Merit Scholarship Program applications due
- ▶ All General Fraternity awards applications due
- ▶ Register for Convention (early-bird registration)

### MAY 1

- ▶ Select Chapter Accounting Standards reporting option
- ▶ Spring End-of-Term Report due

### JUNE 1

- ▶ Winter Grade Report due (Quarter schools)
- ▶ Update chapter officers list
- ▶ Chapter dates and academic calendar due
- ▶ All other reporting needs for SCOE (i.e. alumni events) due

### OCTOBER 1

- ▶ Spring Grade Report due

### OCTOBER 15

- ▶ Winter Magazine Report due

### DECEMBER 10

- ▶ Update university/chapter/housing profiles
- ▶ Update chapter officers list
- ▶ Fall End-of-Term Report due

### SEPTEMBER 1

- ▶ PPEA certification for fall new member programs
- ▶ Constitution & Bylaws for fall semester

### SEPTEMBER 30

- ▶ Brotherhood survey opens

### OCTOBER 31

- ▶ Brotherhood survey closes

### DECEMBER 15

- ▶ PPEA certification for winter / spring new member programs
- ▶ Constitution & Bylaws for winter / spring semester