



# Vice President Finance/Housing

JANUARY 24-26, 2025



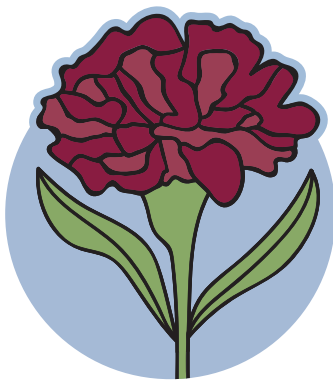
COLLEGE  
WEEKEND



## WELCOME TO COLLEGE WEEKEND!

This weekend is all about **you**, and we're so excited to help you kick off the year ahead!

On behalf of the entire Fraternity, our volunteer officers and staff, thank you for making the decision to join us in St. Louis for College Weekend! This weekend's programs are designed to prepare you for leadership in Pi Beta Phi and lay the groundwork for success in your new role. Throughout the weekend, you'll have opportunities to meet sisters from chapters across North America. Take advantage of this time to learn, grow and connect with Pi Phi leaders who share your dedication and passion for our sisterhood. We hope you'll be inspired by your fellow leaders to set the stage for the year ahead. The tools, knowledge and skills you gain this weekend will serve as the building blocks of your leadership journey within Pi Beta Phi.



# Send Pi Phi Love

Send a wine carnation to share Pi Phi Love with the special sisters in your life! Honor a friend, chapter leader, Advisor or mentor with a \$5 gift to our Foundation. Wine carnation honorees attending College Weekend will receive wine carnation enamel pins onsite, and all honorees will receive a personal email filled with Pi Phi Love.

Stop by the Wine Carnation Garden in the Grand Foyer or scan the QR code to help our garden bloom.



*Gifts to our Foundation support you and every Pi Phi sister—and make leadership development events like College Weekend possible. Learn more at [pibetaphi.org/foundation](https://pibetaphi.org/foundation).*



# PI BETA PHI COLLEGE WEEKEND AGENDA

## FRIDAY, JANUARY 24, 2025

11 a.m.-9 p.m.	<b>Registration</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
11 a.m.-6 p.m.	<b>BetaBase Learning Lab</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
	<b>Digital Pix</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
	<b>Pi Beta Phi Foundation Wine Carnation Garden</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
	<b>Shop Pi Phi</b>	GRAND C, 4 <sup>TH</sup> FLOOR
1-3 p.m.	<b>Headquarters Tour</b> ( <i>pre-registration required</i> )	LOBBY, 4 <sup>TH</sup> STREET ENTRANCE
3-5 p.m.	<b>Headquarters Tour</b> ( <i>pre-registration required</i> )	LOBBY, 4 <sup>TH</sup> STREET ENTRANCE
3-6 p.m.	<b>Leadership and Nominating Committee (LNC) Meetings with Alumnae Advisory Committee (AAC) Members</b> <i>Sign up required; visit the app for available times.</i>	STERLING STUDIO 2, 2 <sup>ND</sup> FLOOR
6-7:45 p.m.	<b>Opening Dinner and Keynote</b>  Tina Rae VanSteenbergen will kick off College Weekend with her keynote, <i>Creating Confidence</i> , where she'll share how confidence has long been an expectation of women. Tina will explore confidence as a journey, a long and at times treacherous hike—one with hills, valleys, twists, turns and no map.	GRAND DEFGH, 4 <sup>TH</sup> FLOOR
8-9 p.m.	<b>Educational Colleges</b>	
	<b>Alumnae Advisory Committee College</b>	REGENCY AB, 2 <sup>ND</sup> FLOOR
	<b>Chapter President College</b>	REGENCY C, 2 <sup>ND</sup> FLOOR
	<b>Community Relations College</b>	REGENCY F, 2 <sup>ND</sup> FLOOR
	<b>Finance/Housing College</b>	REGENCY E, 2 <sup>ND</sup> FLOOR
	<b>Inclusion College</b>	GATEWAY WEST, 18 <sup>TH</sup> FLOOR
	<b>Member Experience College</b>	REGENCY D, 2 <sup>ND</sup> FLOOR
	<b>Operations College</b>	GRAND AB, 4 <sup>TH</sup> FLOOR
	<b>Recruitment College</b>	GATEWAY EAST, 18 <sup>TH</sup> FLOOR
<b>Risk Management College</b>	PARK VIEW, 4 <sup>TH</sup> FLOOR	
9-10 p.m.	<b>LNC Meetings with AAC Members</b> <i>Sign up required; visit the app for available times.</i>	STERLING STUDIO 2, 2 <sup>ND</sup> FLOOR





## SATURDAY, JANUARY 25, 2025

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7:30-8:30 a.m.	<b>LNC Meetings with AAC Members</b> <i>Sign up required; visit the app for available times.</i>	STERLING STUDIO 2, 2 <sup>ND</sup> FLOOR
8 a.m.-7 p.m.	<b>Registration</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
	<b>BetaBase Learning Lab</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
	<b>Digital Pix</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
	<b>Pi Beta Phi Foundation Wine Carnation Garden</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
8 a.m.-10 p.m.	<b>Shop Pi Phi</b>	GRAND C, 4 <sup>TH</sup> FLOOR
8-8:45 a.m.	<b>Breakfast</b> A breakfast buffet is available for all registrants.	GRAND DEFGH, 4 <sup>TH</sup> FLOOR
	<b>LGBTQIA+ Affinity Group Meet-up</b> LGBTQIA+ Affinity Group members are invited to grab breakfast from the buffet and join fellow sisters for casual conversations. Feel free to come and go as you please and explore other meet-ups happening at the same time. To learn more or to join, visit <a href="https://pibetaphi.org/lgbtqia">pibetaphi.org/lgbtqia</a> .	STERLING STUDIO 5, 2 <sup>ND</sup> FLOOR
	<b>Members of Color Affinity Group Meet-up</b> Members of Color Affinity Group members are invited to grab breakfast from the buffet and join fellow sisters for casual conversations. Feel free to come and go as you please and explore other meet-ups happening at the same time. To learn more or to join, visit <a href="https://pibetaphi.org/membersofcolor">pibetaphi.org/membersofcolor</a> .	STERLING STUDIO 4, 2 <sup>ND</sup> FLOOR
	<b>Pi Phi Pages Group Meet-up</b> Pi Phi Pages participants are invited to grab breakfast from the buffet and join fellow sisters for casual conversations. Feel free to come and go as you please and explore other meet-ups happening at the same time. To learn more or to join the Facebook group, visit <a href="https://pibetaphi.org/piphipages">pibetaphi.org/piphipages</a> .	STERLING STUDIO 9, 2 <sup>ND</sup> FLOOR
9-11:45 a.m.	<b>Educational Colleges</b>	
11:45 a.m.-12:45 p.m.	<b>LNC Meetings with AAC Members</b> <i>Sign up required; visit the app for available times.</i>	STERLING STUDIO 2, 2 <sup>ND</sup> FLOOR
12-1 p.m.	<b>Lunch</b> Enjoy a lunch buffet as you share what you've learned with your sisters, connect with Pi Phis from other chapters and exchange ideas. No programming is scheduled during lunch.	GRAND DEFGH, 4 <sup>TH</sup> FLOOR
1:15-3 p.m.	<b>Educational Colleges</b>	
3-4 p.m.	<b>Mental Health Break</b> Grab your sisters, get outside or decompress during our mental health break. A snack will be provided in the Grand Foyer.	GRAND FOYER, 4 <sup>TH</sup> FLOOR
	<b>LNC Meetings with AAC Members</b> <i>Sign up required; visit the app for available times.</i>	STERLING STUDIO 2, 2 <sup>ND</sup> FLOOR

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4:15–6:15 p.m.	<b>Educational Colleges</b>	
7–10 p.m.	<b>Pink Party Dinner</b>	GRAND DEFGH, 4 <sup>TH</sup> FLOOR
	Change into your Pink Party T-shirt and join your sisters for a buffet dinner alongside a silent disco and a Pi Beta Phi Cookie Shine.	
8:30–10 p.m.	<b>Alumnae Reception</b>	RED PRIVATE DINING ROOM, 1 <sup>ST</sup> FLOOR
	Network with Pi Phi alumnae and swap sisterhood stories over desserts.	
	<b>LNC Meetings with AAC Members</b>	STERLING STUDIO 2, 2 <sup>ND</sup> FLOOR
	<i>Sign up required; visit the app for available times.</i>	

**SUNDAY, JANUARY 26, 2025**

7:30–8: a.m.	<b>LNC Meetings with AAC Members</b>	STERLING STUDIO 2, 2 <sup>ND</sup> FLOOR
	<i>Sign up required; visit the app for available times.</i>	
8 a.m.–12 p.m.	<b>Registration</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
	<b>Pi Beta Phi Foundation Wine Carnation Garden</b>	GRAND FOYER, 4 <sup>TH</sup> FLOOR
8–8:45 a.m.	<b>Breakfast</b>	GRAND DEFGH, 4 <sup>TH</sup> FLOOR
	A breakfast buffet is available for all registrants. No programming is scheduled during breakfast.	
9–9:45 a.m. and 10–10:45 a.m.	<b>Workshop Sessions 1 &amp; 2</b>	
	<b>Balancing Act</b>	Regency D
	<b>Building Bridges</b>	Regency B
	<b>Career Confidence</b>	Regency E
	<b>Conquering Conflict</b>	Regency C
	<b>Crafting Your Chapter Brand</b>	Regency F
	<b>Delegation Decoded</b>	Gateway West
	<b>Facilitation Foundations</b>	Regency A
	<b>Home Sweet Home</b>	Grand AB
	<b>Keys to Success*</b>	Sterling Studio 6
	<b>Retention by Design</b>	Gateway East
	<b>Safe Sisterhood</b>	Sterling Studio 9
	<b>The Power of YOU</b>	Parkview
11–11:30 a.m.	<b>Closing General Session</b>	GRAND DEFGH, 4 <sup>TH</sup> FLOOR
	We'll end our time together by reflecting on the biggest highlights and key takeaways from the weekend. You'll leave energized and ready to drive positive change within your chapters and beyond.	

\*Keys to Success is only being offered during Session 1





## KEYNOTE SPEAKER

### TINA RAE VANSTEENBERGEN

Tina Rae VanSteenbergen is on a mission to change the narrative for women. Her work is rooted in a powerful belief: women need women—to succeed in the workplace, to feel understood, to believe in themselves and to feel less alone. Through her authentic, heartfelt speaking style, Tina empowers women to tear down the walls between them, foster genuine connections and build strong communities filled with empathy, kindness and empowerment.

With a blend of storytelling, humor and honesty, Tina has inspired hundreds of thousands of women across North America to take up space in their personal and professional lives. She helps women embrace their confidence—not as a simple expectation, but as a shared journey of growth, resilience and self-discovery.

Tina's keynote promises to leave you inspired, connected and ready to embrace your authentic confidence as you navigate the twists and turns of life.



## COLLEGE WEEKEND ANNOUNCEMENTS

### MISSING SOMETHING? WE CAN HELP!

Stop by the registration desk in the 4<sup>th</sup> Floor Grand Foyer to pick up your lost items or drop off something you've found. The lost and found will be open Friday 11 a.m.-9 p.m., Saturday 8 a.m.-7 p.m. and Sunday 8 a.m.-12 p.m.

### DOWNLOAD THE PI PHI EVENTS APP AND STAY UP TO DATE

When you download the Pi Beta Phi events app, you'll have instant access to all things College Weekend. From the agenda and hotel map to important announcements and an attendee directory, the Pi Phi app will keep you in the know. Follow the steps below to download.

1. Search for the Pi Beta Phi Events app in the App Store on iOS devices and the Play store on Android.
2. Download and install the app.
3. Open the app and select Pi Beta Phi College Weekend 2025.
4. Follow the instructions listed and log in using the email you used during registration.
5. Enter the four-digit verification code from your email into your device when prompted.



### LET'S GET SOCIAL

College Weekend is an experience like none other. Share your favorite moments on social media using #PiPhiLeaders and #PiPhiCollegeWeekend and you may see your photos on the big screen!



### LEVEL UP AT THE BETABASE LEARNING LAB

Want to take your BetaBase skills to the next level? The BetaBase Learning Lab offers a hands-on opportunity to explore our new member portal. Work alongside fellow officers and Advisors as you explore tools for managing your chapter, practice running reports and work through real-world scenarios with staff and volunteers!

### SHARE YOUR STORY

Our sisterhood is made up of thousands of members with unique identities, backgrounds and experiences. While we have common values and a shared love for Pi Phi, every member brings something special to our sisterhood; every member has a story to share—from how Pi Phi empowered you to lead and your favorite memories living in the chapter house to how you celebrate holidays throughout the year and the incredible work you’re doing in your community.

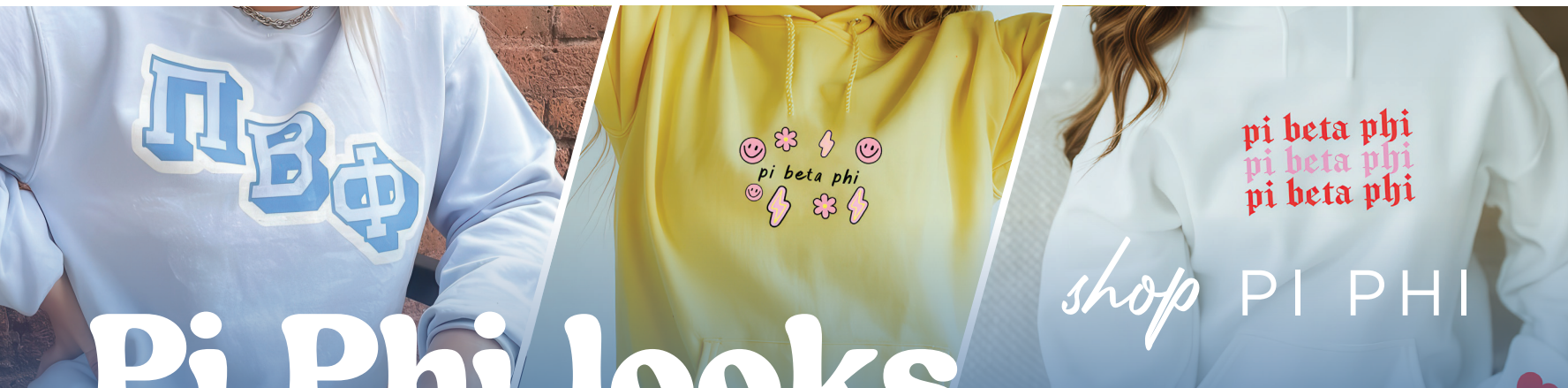
Scan the QR code and complete the form to share your story!



### SHOP PI PHI

Ready to add to your Pi Phi collection? Stop by Grand C on the 4<sup>th</sup> Floor to shop our most popular styles and find a few new favorites. From sweatshirts to stickers—there’s something for everyone!

When you Shop Pi Phi, you support Pi Phi! A portion of every purchase comes back to the Fraternity.



# Pi Phi looks good on you!

Shop the largest collection of Pi Phi merchandise all year long at [shoppiphi.com](http://shoppiphi.com).

When you Shop Pi Phi, you support Pi Phi! A portion of every purchase comes back to the Fraternity.





**“IT WAS NOT JUST THE FINANCIAL SUPPORT THAT MEANT SO MUCH TO ME, BUT THE RECOGNITION FROM AN ORGANIZATION THAT I HAVE BEEN A PART OF FOR YEARS.”**

**— WHITNEY STANTON, COLORADO ALPHA**

Whitney is one of 106 Pi Phis who received a Foundation scholarship or fellowship during the 2024-2025 academic year.

Our Foundation provided \$317,846 in scholarship awards for the 2024-2025 academic year to Pi Phi collegians and alumnae pursuing their academic goals—and many scholarships give preference to members from specific chapters.

Scan the QR code to learn more and complete your application by February 15!



## LODGING AND MEALS

### LODGING

Lodging for Friday and Saturday night is included in the registration package for registered attendees. All participants should be checked out of their rooms no later than noon on Sunday. Programming will conclude by 11:30 a.m. to allow participants time to take care of any remaining business. Each attendee will be responsible for incidental expenses (telephone calls, additional meals, snacks, etc.) they incur.

### MEALS

Friday dinner, Saturday breakfast, lunch and dinner, and Sunday breakfast are included in the registration fee. College Weekend events are alcohol-free. Please do not bring alcoholic beverages into any College Weekend functions, including meals.

### SPECIAL ACCOMMODATIONS

When registering for College Weekend, you were prompted to note any special accommodations. If your needs have changed, please stop by registration to let us know so we can best support you throughout the event.

### DIETARY RESTRICTIONS

When registering for College Weekend, you were prompted to note any dietary restrictions. All allergens will be clearly marked on buffets. A dietary restriction card for Friday night's plated meal has been included inside your registration packet. Once seated, please place your dietary restriction card at your place setting to denote your dietary restriction to the banquet server. The banquet staff will then bring you the appropriate meal. In order for all attendees to enjoy the meal, it's important you take the correct meal if you have special dietary restrictions. If you have any additional concerns regarding dietary restrictions at buffet meals, please ask someone from the hotel banquet staff.



# EMERGENCY PROCEDURES

In the event of an emergency while at College Weekend, please follow the hotel procedure first and then Pi Phi procedures as outlined below.

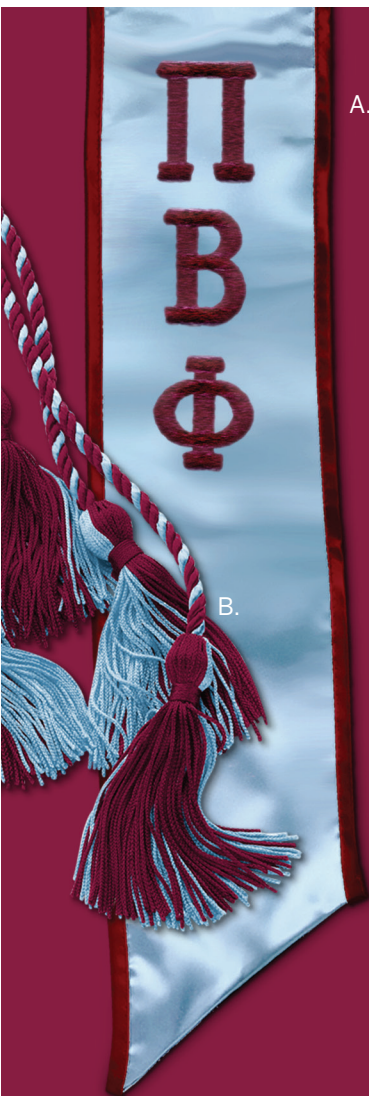
## HOTEL PROCEDURE

In case of emergency, the hotel emergency number is 55.

## PI BETA PHI PROCEDURE

After following the hotel's emergency procedure, contact the Pi Beta Phi Emergency Hotline. The hotline will be staffed 24/7, and the individual answering will know the proper procedures to be followed based on the situation. **The Pi Beta Phi Emergency Hotline number is (636) 236-9463.**

No one goes to the doctor or hospital alone. Always use a "travel buddy" if a visit to a doctor or hospital is necessary. A member of the Alumnae Advisory Committee or a Fraternity Officer should accompany a collegian. Report status after medical treatment to the Pi Beta Phi Emergency Hotline.



A.

# Step into your future

with Pi Beta Phi close to heart



C.

B.



D.



E.



F.



G.



H.



I.



J.



K.



L.



M.

- A. Graduation Stole, #STOLE
- B. Graduation Cord, #CORD
- C. Crown Pearl Badge with Diamond Point, #0203
- D. Crest Guard, #0910
- E. VP Recruitment, #0027
- F. VP Inclusion, #0184
- G. VP Community Relations, #045B
- H. VP Operations, #0003
- I. VP Finance/Housing, #0004
- J. Chapter President, #001A
- K. VP Risk Management, #0067
- L. AAC, #0021
- M. VP Member Experience, #0006

Use code  
**PIPHIWEEKEND25**  
to get FREE\*  
shipping!  
(Valid January 23-  
February 9, 2025.)

# We Are Pi Phi

Pi Phi is made stronger by the diversity of our members, each contributing their own story to our shared history. #WeArePiPhi celebrates the unique identities and experiences of every Pi Phi sister, and your story is an important part of our collective legacy.

Ready to share your story? Scan the QR code and complete the form to let us know!



## NEARBY HOSPITAL AND PHARMACY

### Barnes-Jewish Hospital

1 Barnes Jewish Hospital Plaza, St. Louis, MO 63110  
(314) 747-3000 | barnesjewish.org  
Distance from hotel: 4.8 miles  
Approximate travel time: 15-minute drive

### CVS Pharmacy (inside Culinaria, A Schnucks Market)

315 North 9<sup>th</sup> Street, St. Louis, MO 63101  
(314) 436-7491 | nourish.schnucks.com  
Distance from hotel: 0.5 miles  
Approximate travel time: 10-minute walk

## FIRE AND EVACUATION PROCEDURES

In the event of a fire, the fire alarm will sound on the floor of the emergency, as well as the floors immediately above and below followed by an audible message. Listen to the public address system for directions and proceed to the lobby to await further directions from hotel staff or the Fire Department.

## ACTIVE SHOOTER PROCEDURES

In the case of an active shooter, take these actions:

1. **Run:** If there is an escape path, attempt to evacuate. Take your phone with you but leave all other belongings behind. Help others escape if possible. Prevent others from entering the area. Call 911 when you are safe.
2. **Hide:** When evacuation is not possible, find a place to hide. Lock and/or blockade the door. Silence your phone. Remain quiet.
3. **Fight:** As a last resort, and only if your life is in danger should you attempt to incapacitate the shooter.

## REPORTING SAFETY IN CASE OF EMERGENCY

Collegians and AAC members should report they are safe to the Chapter President of the chapter they are representing. The Chapter President will report to the Collegiate Regional Director. International volunteers should report they are safe to their volunteer supervisor. Headquarters staff should report they are safe to their supervisor.



ΠΒΦ'S 75<sup>TH</sup> BIENNIAL CONVENTION  
**A CELEBRATION**  
*of* **SISTERHOOD**

**JUNE 19-21, 2025**

**THE GALT HOUSE HOTEL  
LOUISVILLE, KENTUCKY**

Pi Beta Phi's 75<sup>th</sup> Biennial Convention: A Celebration of Sisterhood honors our 158-year history and the values at the heart of Pi Beta Phi. Join your Pi Phi sisters in commemorating our shared heritage, celebrating our collective achievements, reaffirming our commitment to our values and envisioning a promising future together.

Registration will open soon at [pibetaphi.org/convention](https://pibetaphi.org/convention).



# HOTEL MAP – 2<sup>ND</sup> FLOOR

**Alumnae Advisory  
Committee College**

Regency Ballroom A-B

**Pi Phi Pages  
Meet-up**

**Building Bridges  
Workshop**

Regency Ballroom B

**Balancing  
Act Workshop**

**Member  
Experience College**

Regency Ballroom D

**Community  
Relations College**

**Crafting Your Chapter  
Brand Workshop**

Regency Ballroom F

**LGBTQIA+  
Affinity Group  
Meet-up**

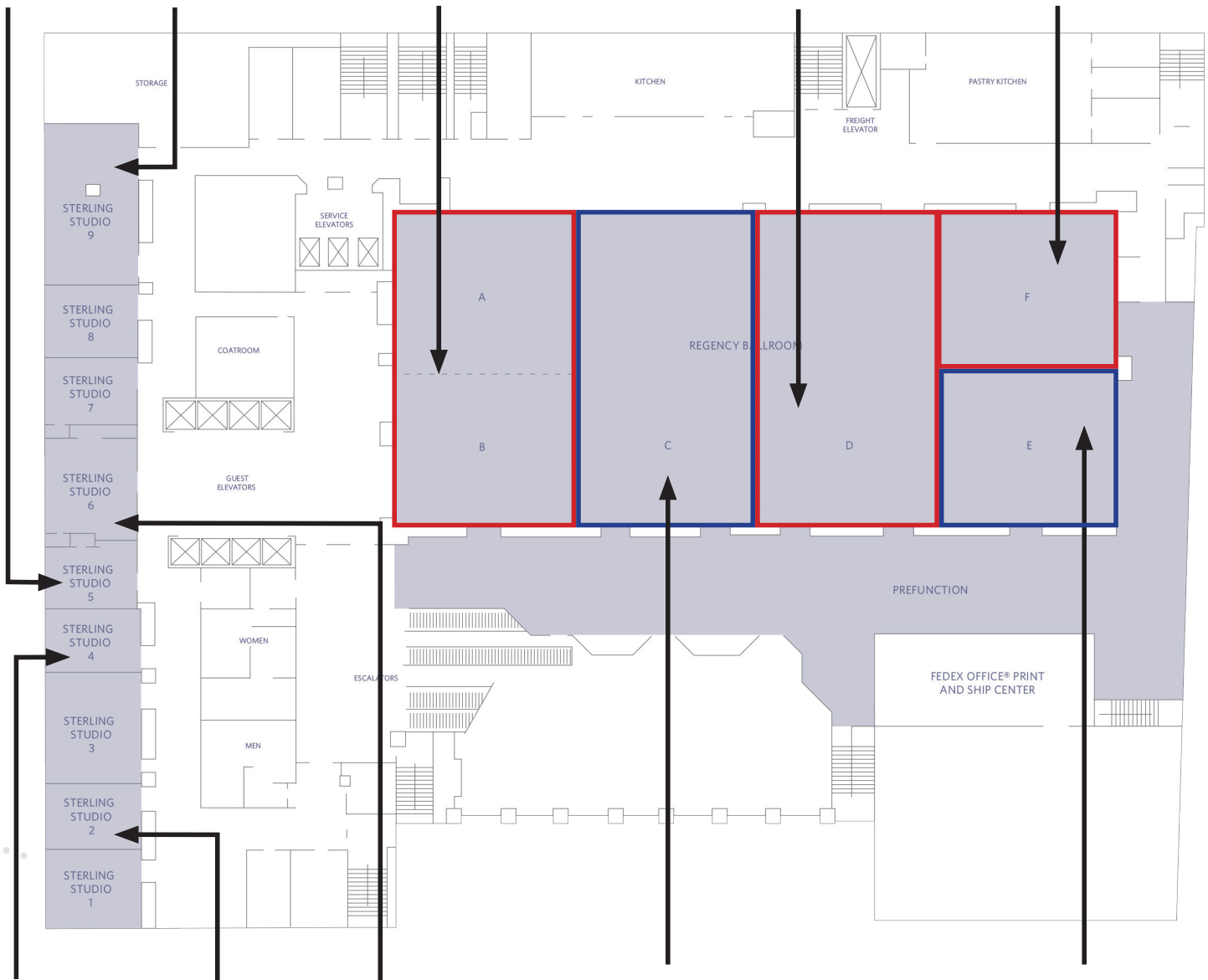
Sterling  
Studio 5

**Safe  
Sisterhood  
Workshop**

Sterling  
Studio 9

**Facilitation Foundations  
Workshop**

Regency Ballroom A



**Members  
of Color  
Affinity Group  
Meet-up**

Sterling  
Studio 4

**LNC  
Meetings**

Sterling  
Studio 2

**Keys to Success  
Workshop**

Sterling  
Studio 6

**Chapter President College**

**Conquering  
Conflict Workshop**

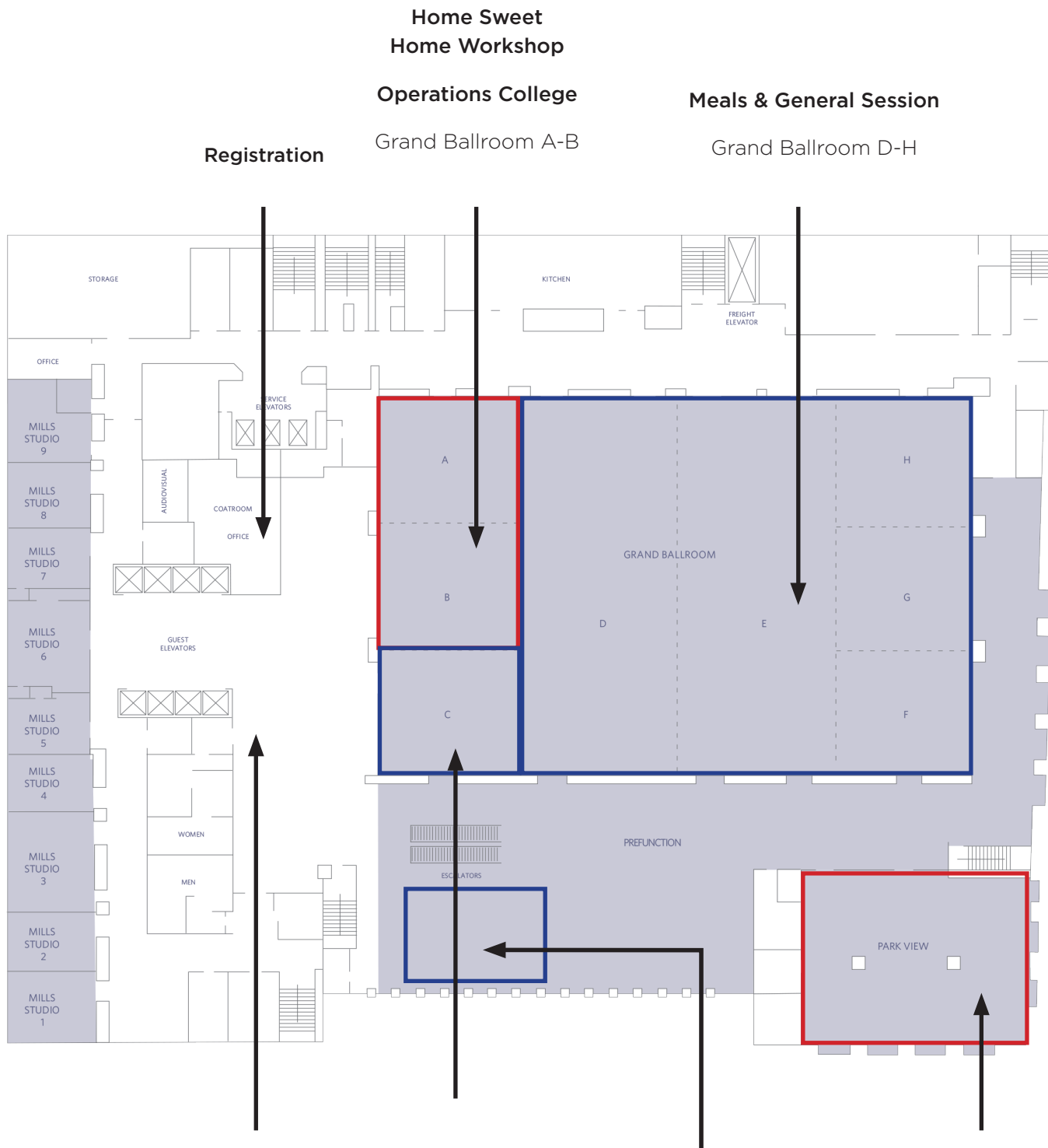
Regency Ballroom C

**Finance/Housing College**

**Career  
Confidence Workshop**

Regency Ballroom E

# HOTEL MAP – 4<sup>TH</sup> FLOOR



Registration

Home Sweet  
Home Workshop  
Operations College  
Grand Ballroom A-B

Meals & General Session  
Grand Ballroom D-H

BetaBase  
Learning Lab  
Digital Pix Booth

Shop Pi Phi  
Grand Ballroom C

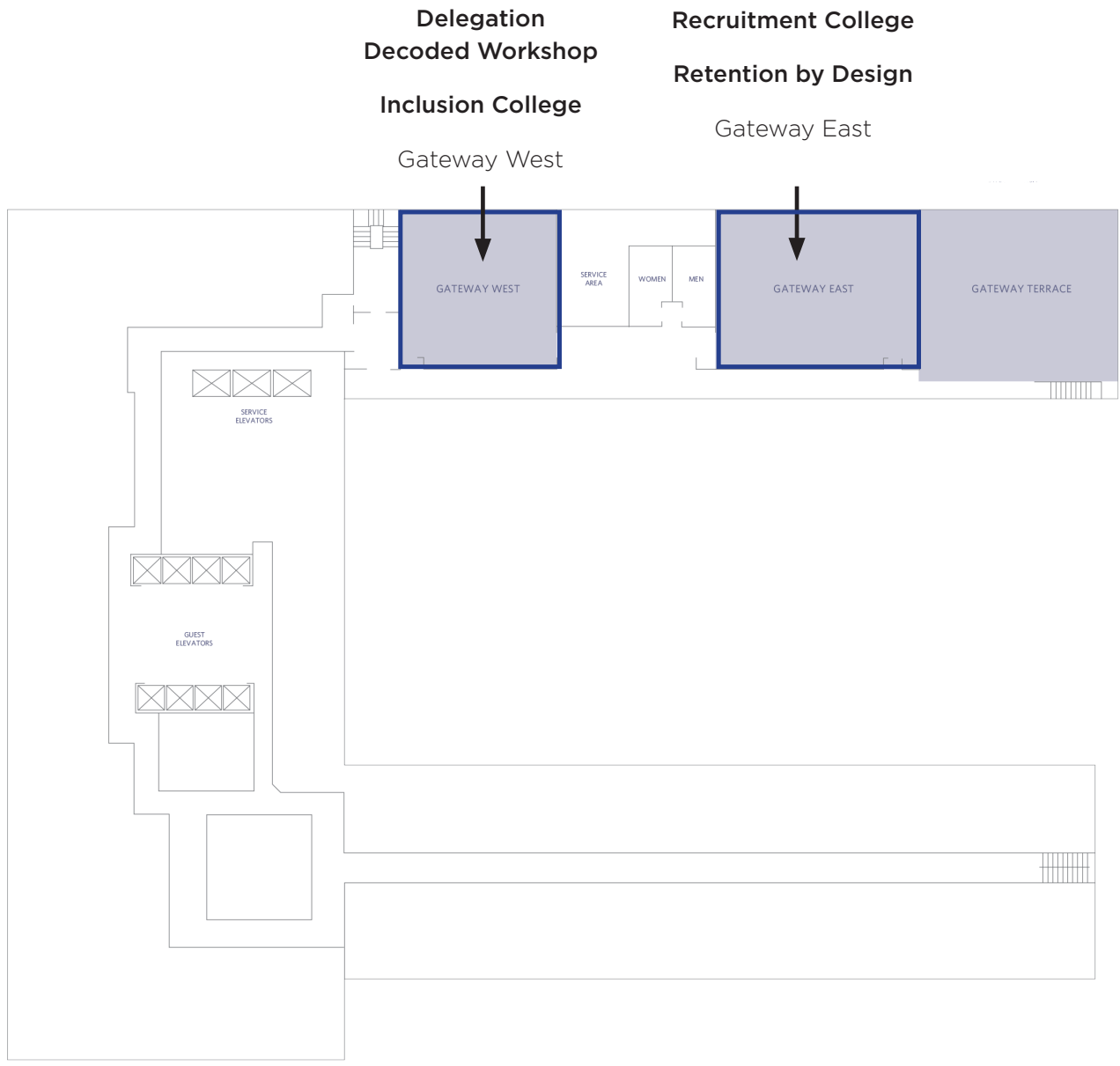
Pi Beta Phi  
Foundation Wine  
Carnation Garden

The Power of  
YOU Workshop  
Risk  
Management College  
Park View





# HOTEL MAP — 18<sup>TH</sup> FLOOR

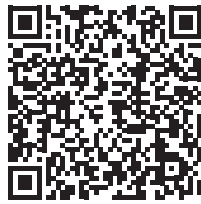


*Pi Phi  
giving  
day*

3.14.25

# Join our Pi Phi Giving Day ambassador team!

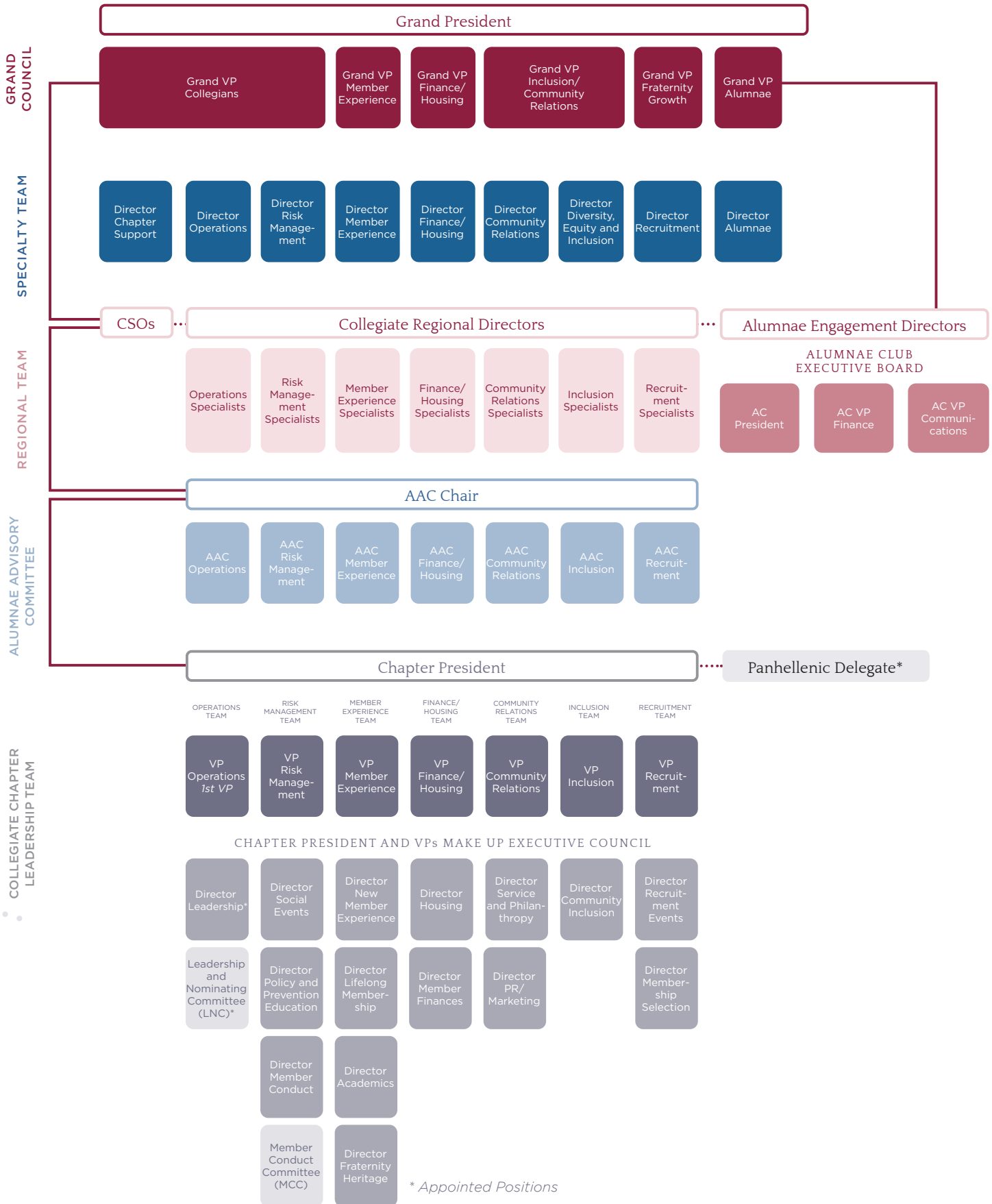
Do you have a passion for Pi Phi and want to make a difference? As an ambassador, you can win exclusive Pi Phi prizes while helping to promote this special day of giving.



Scan the QR code to sign up, then stop by the Wine Carnation Garden in the 4<sup>th</sup> Floor Grand Foyer to pick up your Pi Phi Giving Day ambassador button!



# PI BETA PHI ORGANIZATIONAL STRUCTURE





# PI BETA PHI REGIONAL MAP



## Smile Big

Capture your favorite 2025 College Weekend moments with Digital Pix, our official event photographer!

Stop by their booth in the 4<sup>th</sup> Floor Grand Foyer for a chance to win a FREE chapter composite!





# VOLUNTEERS AND STAFF

## GRAND COUNCIL



**Lisa Gamel Scott**  
COLORADO ALPHA  
Grand President  
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**Melissa Malone Colvin**  
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**Greer Horne**  
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## GRAND COUNCIL EMERITAE



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**Carol Inge Warren**  
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# SPECIALTY DIRECTORS



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**Jennifer Mandeville**  
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**Daphney Rose Bitanga**  
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**Tina Rivard**  
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# REGIONAL TEAMS

## REGION ONE



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**Katie Bills Gerrity**  
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**Jennifer Green Hall**  
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**Deanne Trent**  
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**Debbie Wang**  
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**Katie Francis Moore**  
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**Veronica Milliken Boggs**  
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Community Relations Specialist  
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**Semrin Aleckson Gillespie**  
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Inclusion Specialist  
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**REGION TWO**



**Dana Reilly**  
FLORIDA ZETA  
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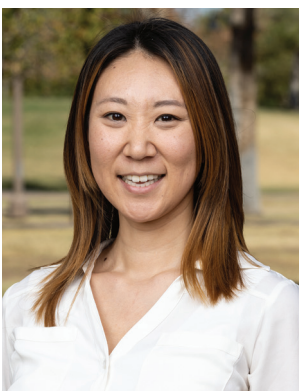
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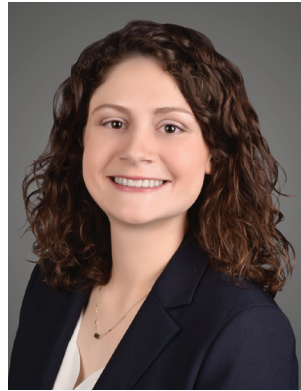
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# WELCOME TO THE FINANCE/HOUSING COLLEGE!

Ready to take control of your chapter's financial future? The Finance/Housing College is your gateway to understanding how the financial health of your chapter affects its overall success. Participants will discover their role in driving success and gain the insights and tools needed to lead with confidence.

## LEARNING OUTCOMES

By participating in the Finance/Housing College, officers will be able to:

- Identify and develop best practices in finance/housing that actively and effectively contribute to the overall financial health of their chapter.
- Educate members on Pi Phi's financial policies and procedures and their financial responsibility to the chapter and the Fraternity.
- Address difficult member finance/housing situations while positively holding members accountable through policies and procedures.
- Understand the relationship between the Vice President Finance/Housing and the Vice President Operations.
- Understand housing policies and procedures as it relates to the Director Housing role, while serving as a mentor to them.

## FINANCE/HOUSING COLLEGE FACILITATORS



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# TRACK AGENDA

## **PART I - WELCOME | FRIDAY 8 - 9 P.M.**

Welcome & Introduction of Facilitators  
Overview of Agenda and Learning Objectives  
Icebreaker Activity  
Saying Yes to Pi Phi

## **PART II - ROLE AS VPFH | SATURDAY 9 - 11:45 A.M.**

Welcome Back + Activity  
Position Description  
Support Systems  
Position Responsibilities High Level  
Relationship with Executive Council  
Relationship with Vice President Operations (VPO)  
Relationship/Mentorship of Director Member Finances (DMF) & Director Housing

## **PART III - DEFINING FINANCE ROLE | SATURDAY 1:15 - 3 P.M.**

Welcome Back + Activity  
Budget Management  
Automatic Financial Probation (AFP)/Automatic Financial Dismissal (AFD) process  
Chapter Fundraising  
Information to Keep Up to Date for Record Keeping Purposes  
Merchant Services/Fundraising Snapshot  
Monthly Chapter Evaluation (MCE)

## **PART IV - YOUR HOUSING ROLE AS VPFH | SATURDAY 4:15 - 6:15 P.M.**

Defining Your Housing Role  
Housing Contract & Live-in Requirement  
The Monetary Importance of Filling the Facility  
Emergency Procedures & Safety and Security  
Emotional Support Animals (ESA) & Service Animal Requests



## SAYING YES TO PI PHI

**WHY DO YOU SAY YES TO PI PHI?**

**WHO HELPS YOU SAY YES TO PI PHI?**

**HOW DO YOU ENCOURAGE OTHERS TO SAY YES TO PI PHI?**



# VICE PRESIDENT FINANCE/HOUSING

## POSITION DESCRIPTION

### OVERVIEW

The Vice President Finance and Housing (VPFH) is responsible for the overall management of chapter financial and housing affairs. They review and maintain accurate financial records, create and monitor the chapter budget, review and approve finance tasks as performed by the Director Member Finances (DMF) and facility management tasks as performed by the Director Housing (DH).

### RESPONSIBILITIES

- Adheres to local and Fraternity financial policies.
- Maintains complete and organized financial records for the chapter.
- Creates and monitors a chapter budget, serving as the chair of the Budget Committee.
- Coordinates the direct preparation of tax returns and other regulatory filing requirements at the instruction of the Fraternity.
- Approves and signs all chapter checks in accordance with Fraternity financial policies.
- Supports the Automatic Financial Probation (AFP) and Automatic Financial Dismissal (AFD) processes by notifying members of their standing with the Fraternity.
- Approves payment plans in conjunction with the Alumnae Advisory Committee (AAC) Finance/Housing Advisor as requested by the DMF.
- Collaborates with the DH to be a liaison between the chapter and the Chapter House Corporation (CHC) or Fraternity Housing Corporation (FHC) and local employees (e.g. House Director and chef/food service).
- Assigns housing contracts in greekbill and monitors the signing of those contracts.
- Collects the Member Housing Residency Request form with support from the DH.
- Partners with AAC on forming the operational housing list for room selection.
- Educates on and enforces all Pi Beta Phi and campus housing policies, obligations and benefits of facility occupancy.
- Reviews and updates the House Rules annually in coordination with the Vice President Operations (VPO).
- Oversees Directors in the areas of daily operational tasks for housing/facility management and finances.
- Contributes to the Monthly Chapter Evaluation.



## KEY DATES AND DEADLINES

<b>JANUARY</b>	<p>Review and amend budget as needed for upcoming term</p> <p>Review and update the House Rules, if required</p> <p>Ensure all housing contracts for the following academic year have been signed in greekbill</p>
<b>FEBRUARY</b>	<p>Review Fraternity dues invoiced from Headquarters</p>
<b>MARCH</b>	<p>Work with Chapter President to request dispensation from the Regional Team if there will be no House Director for upcoming year by March 31</p>
<b>JUNE</b>	<p>Reconcile fundraising events to greekbill and coordinate approval for donations from winter/spring fundraising</p> <p>Unload remaining funds from purchase cards</p>
<b>JULY</b>	<p>Close out all financial records for fiscal year end</p>
<b>AUGUST</b>	<p>Begin collecting information for next fiscal year budget</p>
<b>SEPTEMBER</b>	<p>Submit chapter financial records to Fraternity by Sept. 1</p> <p>Review Chapter/CHC or FHC Agreement and coordinate the signing of the agreement by Sept. 15</p> <p>Meet with the Chapter Budget Committee to prepare the budget</p>
<b>OCTOBER</b>	<p>Review Fraternity dues, master liability insurance and fees for tax preparation invoiced from Headquarters</p> <p>Draft proposed House Rules to be considered with chapter bylaws revisions</p> <p>Collect Member Housing Residency Request forms and follow-up with the DH</p>
<b>NOVEMBER</b>	<p>Sign and submit all necessary tax forms as required</p> <p>Send budget to regional Finance/Housing Specialist (FHS) for approval by Nov. 1</p> <p>Present budget to chapter for voting approval</p> <p>Email proposed House Rules to regional Finance/Housing Specialist for approval by Nov. 1</p> <p>Propose House Rules to chapter for vote by Nov. 15</p>
<b>DECEMBER</b>	<p>Enter chapter approved budget into greekbill for final regional FHS approval</p> <p>Reconcile fundraising events to greekbill and coordinate approval for donations from fall fundraising</p>





## KEY DATES AND DEADLINES (CONTINUED)

<b>ONGOING</b>	<p>Approve and sign checks prepared by the DMF</p> <p>Approve payment plans for members</p> <p>Verify invoicing prepared by the DMF for dues, purchase cards and vendor payments</p> <p>Review monthly chapter Financial Statement for accuracy</p> <p>Ensure all monthly bank and purchase card reconciliations are prepared by the AAC Finance/Housing Advisor no later than the 10<sup>th</sup> of each month</p> <p>Work with Chapter President to request dispensation from the Regional Team if House Director is not able to stay in the house overnight</p> <p>Meet weekly with all Directors on Finance/Housing Team</p> <p>Complete the Monthly Chapter Evaluation on behalf of the Finance/Housing Team each month</p>
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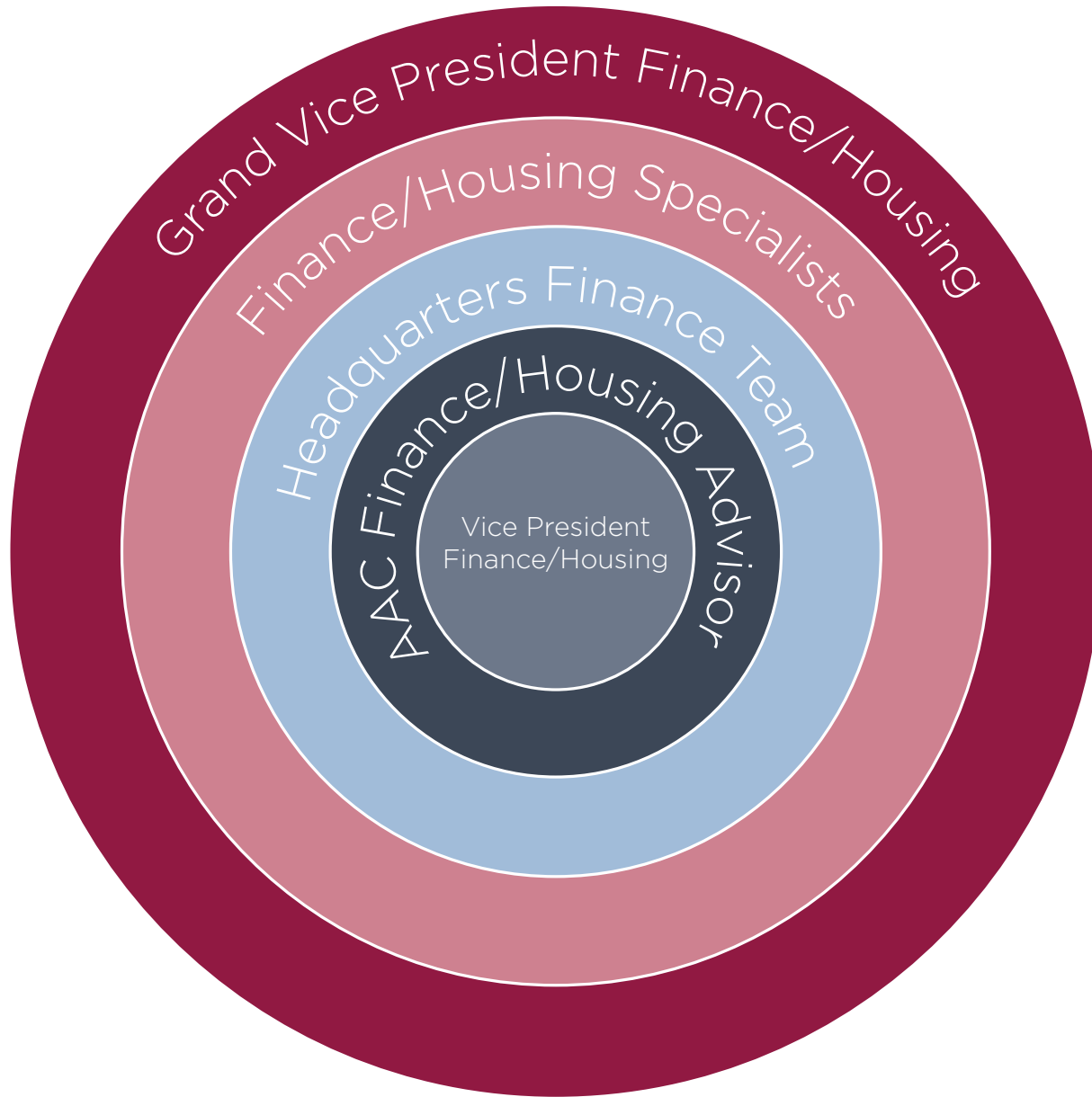
## MANUALS, GUIDES AND RESOURCES

- Budget & Expenses Guide
- Chapter/CHC Agreements
- Chapter Finance Fundraising Guide
- Chapter Officer Report Calendar
- Chapter Taxes & Record Keeping Guide
- Constitution and Statutes
- Electronic Fundraising Platform Request Form
- Emergency Procedures
- Executive Council Officer Manual
- Facility Management Guide
- Housing Contract Guide
- House Rules Template
- Immediate Financial Dismissal Form
- Member Dues & Invoicing Guide
- Member Finance Guide
- Member Housing Residency Request form
- Membership Status Guide and Visual
- Monthly Chapter Evaluation
- Notice of Resignation Form
- Policy and Position Statements





## RESOURCES TO REACH OUT TO



### **GREEKBILL REPRESENTATIVES**

Parker Bendert

### **HEADQUARTERS STAFF**

- Finance Team
- Fraternity Housing Corporation (FHC)
- Chapter Services Team





## SUPPORT SYSTEMS

In the space below, write the name(s) of the people in each of these roles for your chapter. If you do not know who some of these helpful people are, please make sure to talk with one of your facilitators during a break or after a session.

**AAC FINANCE/HOUSING ADVISOR:**

---

**SPECIAL ASSESSMENTS CHAIR (IF APPLICABLE):**

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**FINANCE/HOUSING SPECIALIST:**

---

**FRATERNITY DIRECTOR OF FINANCE/HOUSING:**

---

**STAFF ACCOUNTANT AT HEADQUARTERS:**

---

**ASSISTANT DIRECTOR OF HOUSING AT HEADQUARTERS (FOR FHC CHAPTERS):**

---

**CHC CONTACTS:**

---

**HOUSE DIRECTOR (IF APPLICABLE):**

---

**DIRECTOR MEMBER FINANCES:**

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**DIRECTOR HOUSING:**

---





# LIST OF RESOURCES

- Finance/Housing Functional Guides
  - Chapter Fundraising Guide
  - Budget & Expense Guide
  - Chapter Taxes & Record Keeping Guide
  - Facility Management Guide
  - Housing Contract Guide
  - Meetings & Voting Guide
  - Member Dues & Invoicing Guide
  - Membership Status Guide
  - Point System Guide
- Greekbill training webinars
- Contribution Forms to the Foundation
- Sample Notice of AFP Letter
- Fundraising Tracking Sheet
- Request Forms
  - Payment Plan
  - Merchant Service
  - Electronic Payment
- Emergency Housing Procedures
- Chapter Wish List to CHC/FHC Template
- Member Housing Residency Request Form
- Resident Room Agreement Form
- Safety and Security Guide for Facilities
- CHC and Chapter Division of Costs

### NOTES:

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# OFFICER BUDGET TRACKING FORM

Name \_\_\_\_\_ Officer or Committee \_\_\_\_\_

Budget Covering (Dates) \_\_\_\_\_ Beginning Balance \$ \_\_\_\_\_

Date	Item Purchased	Place of Purchase	Amount	New Balance





# BUDGET ACKNOWLEDGMENT FORM

Officer or Chair: \_\_\_\_\_  
(Name and office/committee)

I have accepted the position and the responsibility of \_\_\_\_\_. Included in my duties are financial responsibilities. For this purpose, I have been given a budget of \_\_\_\_\_ for my office or committee. (Reminder: Officer or committee budgets are based on a fiscal year but allotted by term.)

I will keep a record of the funds I spend and remain within my budget. I will keep a ledger sheet with a record of all expenditures. I understand that this amount is based on \_\_\_\_\_ in the chapter. If there are fewer members, the amount allotted will be reduced accordingly.

If I should need more money than has been budgeted for my office or committee, I must request an increase in writing at an Executive Council meeting prior to money being spent. Valid reasons for extra funds needed should be explained. Otherwise, if I exceed my budget, I must pay the excess amount.

Reimbursements will not be made to any member who is delinquent in dues or fines. A reimbursement form with receipts attached must be submitted in order to receive a reimbursement.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Officer or Committee Signature

\_\_\_\_\_  
Vice President Finance/Housing Signature

\_\_\_\_\_  
AAC Finance/Housing Advisor Signature



# DIRECTOR MEMBER FINANCES

## POSITION DESCRIPTION

### OVERVIEW

The Director Member Finances (DMF) is responsible for performing all daily operational financial tasks related to chapter and member finances, including accounts receivable and accounts payable tasks for the chapter. The Director Member Finances educates and invoices chapter members for their individual financial obligations and prepares payments for all chapter expenditures in greekbill. The Director Member Finances supports the Automatic Financial Probation (AFP) and Automatic Financial Dismissal (AFD) processes and notifications.

### RESPONSIBILITIES

- Invoices members according to budget and per housing contracts in coordination with Vice President Finance/Housing.
- Manages special assessment invoicing in greekbill.
- Supports the AFP and AFD processes by monitoring member accounts and works with the Vice President Finance/Housing to notify members of their standing with the Fraternity.
- Confirms member financial standing with Vice President Operations for member status changes.
- Assigns approved members to payment plans.
- Prepares and prints all chapter checks in accordance with Fraternity financial policies for approval and signature by Vice President Finance/Housing, Alumnae Advisory Committee (AAC) Finance/Housing Advisor and AAC Chair.
- Records monthly purchase card transactions and Fraternity charges into greekbill.

## KEY DATES AND DEADLINES

<b>JANUARY</b>	Make payments in accordance with Chapter/CHC or FHC Agreement
<b>FEBRUARY</b>	Enter Fraternity dues invoiced by Headquarters into greekbill
<b>MARCH</b>	Invoices for third term (if applicable) entered in greekbill for Finance/Housing Advisor review March 1 through March 31
<b>JUNE</b>	Pay all outstanding chapter invoices remaining for the fiscal year Pay and mail donations from winter/spring fundraising to recipient organization(s) by June 30
<b>JULY</b>	Enter fall invoices into greekbill for AAC Finance/Housing Advisor review July 1 through July 31
<b>AUGUST</b>	Make payments in accordance with Chapter/CHC or FHC Agreement Enter Fraternity dues, master liability insurance, and CPA fees for tax preparation invoiced by Headquarters into greekbill
<b>OCTOBER</b>	Update housing contracts in greekbill for regional Finance/Housing Specialist approval by Oct. 30
<b>NOVEMBER</b>	Assign housing contracts to members in greekbill
<b>DECEMBER</b>	Enter winter/spring invoices into greekbill for Finance/Housing Advisor review Dec. 1 through Dec. 31 Pay and mail donations from fall fundraising events to recipient organization(s) by Dec. 31 Postmark required Pi Beta Phi Foundation Friendship Fund and The Literacy Fund contributions by Dec. 31 Postmark optional Pi Beta Phi Foundation contributions by Dec. 31
<b>ONGOING</b>	Monitor member balances and send AFP notification letters Monitor and push through invoices each month Input and pay all approved invoices and reimbursements for chapter expenses Record monthly chapter Financial Statement for Fraternity charges into greekbill Classify all purchase card payments monthly in greekbill Meet weekly with the Vice President Finance/Housing

## MANUALS, GUIDES AND RESOURCES

- AFP Notification Letter
- Budget & Expenses Guide
- Chapter Fundraising Guide
- Chapter Officer Report Calendar
- Chapter Taxes & Record Keeping Guide
- Immediate Financial Dismissal Form
- Member Dues & Invoicing Guide
- Payment Plan Request Form
- Special Assessment Order Form





# AFF SAMPLE LETTER

Date

Dear \_\_\_\_\_:

The purpose of this letter is to notify that you have been placed on Automatic Financial Probation in accordance with the Pi Beta Phi Constitution and Statutes and Chapter Bylaws. You have not fulfilled your financial obligations to the chapter and have an outstanding balance in your account.

The Vice President Finance/Housing is obligated to inform each financially delinquent member that they are being placed on Automatic Financial Probation, and a Notice of Automatic Financial Probation is being filed with Pi Beta Phi Fraternity Headquarters. You have six months to pay the money owed to the chapter. Failure to pay all money (including the 10% pre-collections fee) within six months will result in your Automatic Dismissal from Pi Beta Phi Fraternity.

During the time you are on Automatic Financial Probation, you may not attend social events, and you shall have neither voice nor vote in chapter meetings until the full balance is paid. You must attend all chapter meetings and fulfill all chapter obligations, but you may not hold a chapter office. At the time that you make full payment to the chapter, you will be reinstated as a member in good standing with all the rights of membership.

If you fail to pay the full balance owed to the chapter during the six-month financial probation and have been automatically dismissed, your delinquent account will be submitted to Fidelity Information Corporation (FIC) Collection Agency. At that time, your delinquent balance will include the addition of a 50% collections fee. You will be obligated to pay the total delinquent amount owed to the chapter and the collection fee.

If you fail to make payment and are automatically dismissed at the end of six months, you will no longer be a member of Pi Beta Phi, and you will not receive *The Arrow* or be eligible to participate in chapter events or alumnae functions.

You are a valuable member of our chapter and Pi Beta Phi, and we do not want to lose you. However, it is not fair to those members who pay their invoices and support the chapter to allow delinquent members to enjoy the privileges of membership. The chapter cannot function if all members do not meet their financial obligations.

If you are not currently obligated to a housing contract for the current or upcoming academic year, you may have the option for Immediate Financial Dismissal. Immediate Financial Dismissal allows a member to request to be immediately dismissed from the Fraternity while still remaining financially responsible for the debt already incurred to the chapter and Fraternity. In the Resource Library at [betabase.pibetaphi.org](http://betabase.pibetaphi.org) the application for Immediate Financial Dismissal is available to print. This option, upon application and approval, would discontinue future chapter and Fraternity invoicing.

Yours in Pi Beta Phi,  
Vice President Finance/Housing





# MONTHLY CHAPTER EVALUATION FOR VICE PRESIDENT FINANCE/HOUSING AND FINANCE/HOUSING TEAM

## MEETING EXPECTATIONS STANDARDS

- Reviews officer budget to actuals for each term and works with officers who are close to or over their budget to ensure overspending does not happen
- Headquarters charges are accurately entered into greekbill monthly
- Submits required documents to Headquarters and/or the Regional Team by the set deadlines including chapter financial records and annual budget
- Chapter Budget Committee meets more than once to review the Budget to Actual Report and recommend adjustments as necessary
- Reviews members on AFP roster in BetaBase monthly and sends the notice of AFP to members via certified mail.
- The chapter facility is filled to capacity (for chapters with housing facilities)

## EXCEEDING EXPECTATIONS STANDARDS

- Presents a financial education program focused on topics outside the scope of Pi Beta Phi financial policies
- Ensures consistent monthly communication or meetings are conducted with the Chapter House Corporation/Fraternity Housing Corporation



# DIRECTOR HOUSING POSITION DESCRIPTION

## OVERVIEW

The Director Housing (DH) attends to the physical needs of the chapter as a whole by ensuring a safe, comfortable atmosphere for all members on a daily, operational basis. She does this by advocating for the facility needs of members and the chapter and supports the VPFH by ensuring all applicable house rules, policies, contracts and obligations are understood and enforced. She builds positive relationships with various stakeholders including local employees (i.e. House Director and chef/foodservice), Alumnae Advisory Committee, and the Chapter House Corporation (CHC) or Fraternity Housing Corporation (FHC) to best serve the members of the chapter.

## RESPONSIBILITIES

- Acts as the primary liaison with CHC/FHC and the House Director.
- Oversees day-to-day chapter usage of the chapter facility/property and coordinates with CHC/FHC and the House Director to keep the facility running smoothly.
- Works with the Director Member Conduct and Member Conduct Committee to enforce housing obligations in the chapter's bylaws.
- Coordinates chapter facility fire drills and inspection of fire equipment.
- Directs housing check in and check out procedures.
- Assists CHC/FHC in taking annual inventory of chapter furnishings and equipment.
- Plans annual appreciation for CHC volunteers and facility employees.
- Serves as the chapter liaison between chef/foodservice to address chapter needs.
- Leads annual wish list request process between chapter and CHC/FHC.
- Establishes and enforces house duties for live-in members.
- Leads the distribution of the Member Housing Residency Request form and tracks completion.

## KEY DATES AND DEADLINES

<b>JANUARY</b>	<p>Coordinate facility fire drills and inspection of all fire equipment</p> <p>Establish house duties for live-in members</p> <p>Collaborate with Director Member Finances to ensure housing contracts for upcoming year have been signed in GreekBill</p>
<b>FEBRUARY</b>	<p>Connect with CHC/FHC on annual wish list request process</p>
<b>APRIL/MAY</b>	<p>Conduct check-out procedures for moving out of facility</p> <p>Submit final wish list requests for chapter to CHC/FHC</p>
<b>JULY</b>	<p>Develop check in and check out procedures for upcoming year</p>
<b>AUGUST/ SEPTEMBER</b>	<p>Arrange for fire inspection of premises by local authorities with CHC/FHC</p> <p>Coordinate facility fire drills and inspection of all fire equipment</p> <p>Educate all members on housing obligations and coordinate the completion of the Member Housing Residency Request form</p> <p>Establish house duties for live-in members</p> <p>Meet with chef/foodservice vendor to identify chapter and member needs</p>

## KEY DATES AND DEADLINES (CONTINUED)

<b>OCTOBER</b>	Draft proposed House Rules with Vice President Finance and Housing
<b>NOVEMBER</b>	Email proposed House Rules to regional Finance/Housing specialist for approval by Nov. 1 Propose House Rules to chapter for vote by Nov. 15 Coordinate the signing of the Chapter/CHC or FHC Agreement
<b>ONGOING</b>	Schedule monthly meetings with CHC/FHC and weekly meetings with House Director and chef/foodservice Meet weekly with Vice President Finance and Housing

## MANUALS, GUIDES AND RESOURCES

- Budget & Expenses Guide
- Bylaws Addendum Template
- Chapter/CHC Facility, Storage, Suite or Third Party Agreements
- Chapter Gifts to CHC Template
- Chapter Officer Report Calendar
- Chapter Taxes & Record Keeping
- Chapter Wish List to CHC Template
- CHC and Chapter Division of Costs
- Dispensation Governing Document Request Form
- Emergency Procedures
- ESA and Service Animal Request
- Facility Management Guide
- Housing Contracts Guide
- Member Dues & Invoicing Guide
- Member Housing Residency Request form
- Points Systems Guide
- Resident Room Agreement Form



## YOU SHOULD DOWNLOAD THESE HOUSING DOCUMENTS FROM THE RESOURCE LIBRARY!

- Chapter CHC Agreement
- Chapter Wish List to CHC Template
- CSL Preventative Maintenance Guide
- Director Housing Position Description
- Emergency Procedures
- Safety & Security Guide
- Facility Management Guide
- Policy and Position Statements
- House Rules Template
- Housing Contract Guide
- Member Housing Residency Request Form
- Point System Guide
- Resident Room Agreement Form

### NOTES:

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# MEMBER HOUSING RESIDENCY REQUEST FORM

Name: \_\_\_\_\_ Chapter: \_\_\_\_\_ Date: \_\_\_\_\_

## STEP 1 - REQUEST SELECTION

Please select one of the following options:

- A. I am requesting to live in the chapter facility for the upcoming academic year.  
Please continue to **complete Step 5.**
- B. I am requesting accommodations from FHC/CHC/the University in order to live in the chapter facility for the upcoming academic year. Please continue to **complete Steps 2, 4 and 5.**
- C. I am requesting dispensation to not live in the chapter facility for the upcoming academic year.  
Please continue to **complete Steps 3, 4 and 5.**

## STEP 2 - ACCOMMODATION REQUEST DETAILS

**What accommodations would you require in order to live in the chapter facility for the upcoming year?**

- Release from the meal plan/food/board portion of my obligation due to a medical or other health condition.
- Single room
- Priority room selection
- Room in a specific location (please specify: first floor, close to bathroom, etc.)
- Other (please specify below)

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_







# MEMBER HOUSING RESIDENCY REQUEST FORM

## STEP 3 - DISPENSATION REQUEST DETAILS

**If you are requesting dispensation to not live in the chapter facility for the upcoming year, please select which option or options apply.**

*Note: All dispensations will be granted on an individual basis. Please attach relevant documentation. Your request will not be considered without documentation.*

- Financial Hardship: I will be unable to afford the cost of living in the chapter facility for the upcoming year.
- Medical Concern: I have a physical and/or mental health condition(s) which will prevent me from living in the chapter facility the upcoming year and which cannot be accommodated by FHC/CHC/the University. Documentation is required.
- Study Abroad: I will be studying abroad for one or multiple terms for the upcoming year. Please specify below which term you will be abroad.
- Student Teaching: I will be student teaching at a location least 1 hour or 50 miles from campus for one or multiple terms for the upcoming year. Please specify below which term(s) you will be student teaching.
- Transferring: I will be transferring to another academic institution for the upcoming year.
- Resident Advisor: I will be a Resident Advisor for one or multiple terms for the upcoming year. Please specify below which term(s) you will be a Resident Advisor.
- Other: I am requesting dispensation for another reason. Please explain your situation below or attach another document.

## STEP 4 - DOCUMENTATION

Please attach relevant documentation related to your request for an accommodation or dispensation.

**All requests, whether for accommodations or dispensation, require documentation in order to be considered by AAC.**





# MEMBER HOUSING RESIDENCY REQUEST FORM

## STEP 5 - STATEMENT OF ACKNOWLEDGEMENT

In accordance with the Pi Beta Phi Statutes, Article IX, *“So far as college regulations permit, all collegiate members shall live in chapter house or other residential facilities provided for chapter use. Exceptions are permitted only when written authorization has been obtained from Alumnae Advisory Committee (AAC) before arrangements to live elsewhere are made.”*

This policy is **binding** on all chapters that maintain living accommodations for their members and New Members, whether the chapter-approved housing is a house, a residence hall, a dormitory floor, or other approved university housing specified for use by Pi Beta Phi. This is further reinforced by the housing section of the Member Obligations signed annually, which states that as a member or New Member, *“...all members must live in the chapter facility throughout their collegiate membership except when dispensation is provided through the Fraternity’s process. Members may not arrange to live elsewhere without receiving approval to live out.”*

I understand that, in accordance with the procedures outlined above, I may not make other arrangements until granted dispensation of my residency requirement for the upcoming school year by my chapter’s AAC. I further acknowledge this request, whether to live in the chapter facility or to not, may or may not be approved by my AAC.

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_





# MEMBER HOUSING RESIDENCY REQUEST FORM

## STEP 6 - FINAL APPROVAL FROM ALUMNAE ADVISORY COMMITTEE

<b>AAC CHAIR OR AAC FINANCE/HOUSING ADVISOR ONLY</b>
<p><b>Live-In Request</b></p> <p><input type="checkbox"/> Member's request to live in the chapter facility has been <b>granted</b>.</p> <p><input type="checkbox"/> Member's request to live in the chapter facility has been <b>denied</b>.</p> <p><b>Accommodation Request</b></p> <p><input type="checkbox"/> Member's accommodation request has been <b>granted</b>.</p> <p><input type="checkbox"/> Member's accommodation request has been <b>denied</b>.</p> <p><b>Dispensation Request</b></p> <p><input type="checkbox"/> Member's dispensation request has been <b>granted</b>.</p> <p><input type="checkbox"/> Member's dispensation request has been <b>denied</b>.</p>
<p><b>Verification</b></p> <p>Member <input type="checkbox"/> has / <input type="checkbox"/> has not been released from their housing obligation for the upcoming academic year.</p>
<p><b>Explanation/Reasoning for Denial of Request</b></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p><b>AAC Advisor Signature:</b> _____ <b>Date:</b> _____</p>

*Copies of this document shall be given to the member and retained in chapter files.*





# MEMBER HOUSING RESIDENCY REQUEST FORM

## MHRRF DOCUMENTATION GUIDELINES

*Following university regulations, all collegiate initiated members of the chapter shall be required to live in the chapter facility or other quarters where chapter members are housed together, if space available, and pursuant to the terms of the housing contract, unless special permission to live elsewhere has been granted by the Alumnae Advisory Committee or the Regional Team (Pi Beta Phi Statutes, Article IX).*

Pi Beta Phi provides housing accommodations in Pi Beta Phi owned and managed properties for members with disabilities, ensuring their full participation in the residential sorority experience, as per the Fair Housing Act. A disability is a mental or physical impairment that substantially limits one or more major life activities.

To consider an accommodation for a disability in a Pi Beta Phi facility, we need appropriate medical documentation. Members who wish to request housing accommodations due to a disability must submit the document requirements listed below.

## DOCUMENTATION REQUIREMENTS

- Request for an exception, change or adjustment to the housing requirement indicating how the member's disability impacts her ability to live in the chapter facility.
- Signed letter on professional letterhead from a treating provider, which may include physicians, psychologists, counselors, licensed practical nurses (LPNs) or other qualified healthcare professionals that includes:
  - Date the member first sought treatment
  - Whether the member has a physical or mental impairment
  - Whether that impairment substantially limits one or more of the member's major life activities
  - Explanation of type of accommodation requested
  - Explanation of relationship between requested accommodation and disability

A diagnosis or medical provider recommendation alone does not guarantee the request will be approved. Pi Beta Phi considers the requests on a case-by-case basis considering all available accommodations and supports when making final decisions and recommendations. The following factors are examined when determining housing accommodations: the nature of the condition, feasibility of granting the request, the burden on the housing provider, whether granting the accommodation would create a hardship and the availability of alternative measures in place of the requested accommodation.





# OPERATIONAL HOUSING LIST

RANK	NAME	TOTAL POINTS	
1	Jennie Nicol	500	
2	Jennie Horne Turnbull	475	
3	Fannie Whitenack Libbey	470	
4	Rosa Moore	465	
5	Ada Bruen Grier	460	80 Members, ranked by points
6	Nancy Black Wallace	455	
7	Clara Brownlee Hutchinson	450	
8	Emma Brownlee Kilgore	445	50 spots to fill
9	Fannie Thomson	440	
10	Inez Smith Soule	435	
11	Libby Brook Gaddis	430	
12	Margaret Campbell	425	
13	Mary	420	
14	Betty	415	
15	Dorothy	410	
16	Helen	405	
17	Ruth	400	
18	Doris	395	
19	Barbara	390	
20	Virginia	385	
21	Shirley	380	
22	Patricia	375	
23	Jean	370	
24	Frances	365	
25	Elizabeth	360	
26	Mildred	355	
27	Anna	350	
28	Evelyn	345	
29	Lois	340	





## PI BETA PHI EMERGENCY PROCEDURES

**The Chapter President must review the procedures with the chapter at the start of each term. Executive Council and the Alumnae Advisory Committee (AAC) must also review the procedures at an AAC/Exec meeting each term.**

The Chapter President must explain the procedures to all New Members and initiated members at the beginning of each term or minimum of twice per year, so every member understands their roles if an emergency occurs. The chapter should realize the Chapter President is in charge and that she will perform her duties efficiently and wisely. Discuss this with your campus point of contact (Fraternity/Sorority Advisor) so they are aware that you have Emergency Procedures. The Emergency Procedures should be posted in the chapter facility, if applicable. The AAC Chair and House Director must be aware of the complete Emergency Procedures. In case of an emergency, the House Director is responsible for communicating with any house staff.

Chapter President to review with Executive Council and the chapter:

- Examples of emergency situations
- Who is in charge
- Order of command
- Chapter cooperation
- Talking to outsiders, media, emergency personnel
- Taking someone to the hospital
- Who to inform of the emergency
- Privacy and confidentiality
- Process for members marking themselves as “safe” during a crisis (Exec develops process and informs chapter)





# PI BETA PHI EMERGENCY PROCEDURES

<b>EXAMPLES OF EMERGENCY SITUATIONS</b>	
<p><b>SERIOUS INDIVIDUAL MEMBER ISSUES:</b></p> <ul style="list-style-type: none"> <li>• Death of a member</li> <li>• Drug or alcohol-related medical emergency</li> <li>• Life-threatening medical emergency, hospitalization of a member</li> <li>• Serious injury</li> <li>• Suicide attempt or mental health hospitalization</li> <li>• Sexual assault</li> </ul>	<p><b>FOR SERIOUS MEMBER ISSUES:</b></p> <p>Call the Emergency Hotline. Emergency Procedures must be followed in these situations, regardless of whether these occur at the chapter facility, at an event sponsored by the chapter, as result of an off-campus incident or while on break from school.</p>
<p><b>LESS SERIOUS INDIVIDUAL MEMBER ISSUES:</b></p> <ul style="list-style-type: none"> <li>• Minor injury or illness</li> <li>• Other non-life-threatening member issue</li> </ul>	<p><b>FOR LESS SERIOUS MEMBER ISSUES:</b></p> <p>Only call the Emergency Hotline if the member is transported from the <u>chapter facility</u> or from a <u>Pi Beta Phi sponsored event</u>. If the member is not transported from one of these locations, inform the AAC and follow any other applicable Emergency Procedures.</p>
<p><b>CHAPTER FACILITY THREATS:</b></p> <ul style="list-style-type: none"> <li>• Fire at the facility</li> <li>• A crime (theft, break-in, assault) takes place at the facility</li> <li>• An event that may prevent members from remaining in chapter housing or meeting there (e.g. loss of power, water main break, gas leak, flooding, etc.)</li> </ul>	<p><b>FOR FACILITY THREATS:</b></p> <p>Call the Emergency Hotline. Emergency Procedures must be followed in these situations. Inform your House Director if they are not already aware.</p>
<p><b>CAMPUS/COMMUNITY THREATS/CRISES:</b></p> <ul style="list-style-type: none"> <li>• Active shooter on campus</li> <li>• Campus evacuation</li> <li>• Severe weather or natural disaster that has caused students/members to evacuate campus (tornado, hurricane, earthquake—not snow)</li> <li>• Terrorist attack on or near campus</li> <li>• Pandemic outbreak of a major public health issue</li> </ul>	<p><b>FOR CAMPUS/COMMUNITY THREATS:</b></p> <p>Call the Emergency Hotline. Emergency Procedures must be followed in these situations. Inform your House Director if they are not already aware.</p>





<p><b>OTHER:</b></p> <ul style="list-style-type: none"> <li>• Serious and urgent media situation</li> <li>• Member arrest</li> </ul>	<p><b>FOR OTHER EMERGENCIES:</b></p> <ul style="list-style-type: none"> <li>• Consult your AAC if you aren't sure if a situation is an emergency.</li> <li>• Call the Emergency Hotline for serious and urgent media situations outside of business hours.</li> <li>• Do not call the Emergency Hotline when a member is arrested, unless they are arrested at the chapter facility.</li> </ul>
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**ROLES IN AN EMERGENCY**

1. Chapter President assumes command
2. Alumnae Advisory Committee Chair assists the Chapter President
3. Chapter members must follow Chapter President's instructions and cooperate fully

<p><b>CHAPTER PRESIDENT'S ROLE</b></p>	<p>The Chapter President is in charge of any emergency situation, especially one that involves serious injury or death. She must know and understand these Emergency Procedures in advance because in a serious emergency, she may not have the time or opportunity to read them. It is her responsibility to make all necessary decisions upon advice from the AAC Chair, Fraternity officers and Headquarters staff.</p> <p>The Chapter President:</p> <ol style="list-style-type: none"> <li>1. Makes all necessary phone calls.</li> <li>2. Makes all important decisions based on advice from AAC Chair, Fraternity officers and Headquarters staff.</li> <li>3. Keeps Chapter Leadership Team and chapter informed.</li> <li>4. Is the spokesperson for the chapter if it becomes necessary to respond to inquiries from outside of the chapter. All information released to the chapter or others outside the chapter must come from either the Chapter President or AAC Chair—only with advice from Fraternity officers and Headquarters staff.</li> </ol>
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<p><b>WHO IS IN CHARGE IF THE CHAPTER PRESIDENT IS NOT AVAILABLE?</b></p>	<p>If the Chapter President is not available, another officer must assume their duties during an emergency in the following order:</p> <ol style="list-style-type: none"> <li>1. Vice President Operations (who serves in the Chapter President's absence as first Vice President)</li> <li>2. Vice President Risk Management</li> <li>3. Vice President Finance/Housing</li> </ol> <p>These three Vice Presidents must be familiar with these Emergency Procedures in order to carry them out in the Chapter President's absence. The chapter should also know this order of command in an emergency so there will be no confusion and the authority of the Chapter President—or of the Executive Council member filling in—will be recognized.</p>
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# PI BETA PHI EMERGENCY PROCEDURES

<b>VICE PRESIDENT FINANCE/ HOUSING'S ROLE</b>	<p>The Vice President Finance/Housing does the following in an emergency:</p> <ol style="list-style-type: none"><li>1. Keeps the House Director (if applicable) informed of emergencies that relate to their role, which include facility threats, campus evacuations, member death, etc.</li><li>2. Is mindful of member privacy and internal chapter business. They use discretion when sharing emergency information with the House Director.</li><li>3. Assists with housing-related procedures, per the Facility Management Guide in the Resource Library, when there are facility-related emergencies.</li><li>4. If the situation occurred in a chapter housing facility, ensures the facility is closed to non-Pi Phis except for medical, police or university personnel.</li></ol>
<b>CHAPTER MEMBERS' ROLE</b>	<p>Chapter members must:</p> <ol style="list-style-type: none"><li>1. Keep calm and follow the Chapter President's instructions. Recognize them as the leader and spokesperson in any emergency situation. Give their full cooperation.</li><li>2. If the situation occurred in a chapter facility, keep the facility closed to non-Pi Phis except for medical, police or university personnel.</li><li>3. Do not discuss the situation, particularly with any non-chapter members. Only the Chapter President, an AAC Advisor or Headquarters staff should respond to inquiries from outside the chapter. It is perfectly acceptable to say "I don't have any information at this time" to questions asked by outsiders or refer them directly to the Chapter President.</li><li>4. Members may want to share the situation with concerned parents should they hear about the situation, but members should be cautioned not to speculate or share information that doesn't come officially from the Chapter President or AAC. If there is an announcement to be made to all members and parents, it will be developed with the input of Fraternity officers and/or Headquarters staff.</li></ol>
<b>THE AAC'S ROLE</b>	<p>The AAC works together with Fraternity officers (Regional Team, Specialty Directors) and Headquarters staff to develop a strategy for supporting the chapter during a crisis by:</p> <ol style="list-style-type: none"><li>1. Being informed of an emergency by the Chapter President immediately and directing them to call the Emergency Hotline and follow Emergency Procedures.</li><li>2. Connecting with Fraternity officers and Headquarters staff on communication and support tasks.</li><li>3. Supporting the Chapter President and other chapter officers and ensuring their own personal well-being during a crisis.</li><li>4. Cascading communication to the entire AAC.</li><li>5. Interfacing with campus Fraternity/Sorority Advisor, in coordination with Headquarters staff.</li></ol>





# PI BETA PHI EMERGENCY PROCEDURES

## ORDER OF EMERGENCY CALLS

1. Emergency Services
2. AAC Chair
3. Campus Fraternity/Sorority Advisor or contact
4. Pi Beta Phi Emergency Hotline, (636) 236-9463

In an emergency, the Chapter President should follow these procedures for informing others of the situation. The Chapter President should provide those she calls with both her personal cell phone and a backup number, such as another chapter officer's phone number where she can be reached. During an emergency, the AAC, Fraternity officers and Headquarters staff may need to relay information quickly. If the Chapter President knows she will not be available to take follow up calls, she should designate a backup.

<p><b>PHONE CALL 1: EMERGENCY SERVICES</b></p>	<p>The <b>first phone call</b> is to an emergency service—police, fire or ambulance. Telephone numbers of the emergency services should be kept in the chapter facility and in the Chapter President's phone contacts.</p> <p>If you are not sure if emergency services are needed, contact campus police for assistance.</p> <p><b><u>Do not contact parents! Medical or police personnel will inform the family.</u></b></p>
<p><b>PHONE CALL 2: AAC CHAIR</b></p>	<p>The <b>second phone call</b> is to the AAC Chair. If they cannot be reached, contact another AAC member. It is ok to text the AAC Chair, but also keep making phone calls until you reach a member of your AAC on the phone. The AAC should have its own process (e.g. phone tree, group message/email) for cascading communication in emergencies as well.</p>
<p><b>PHONE CALL 3: CAMPUS FRATERNITY/SORORITY ADVISOR OR CONTACT</b></p>	<p>The <b>third call/contact</b> is to make a phone call or send a message (follow your campus' emergency procedure) to the university or campus staff responsible for sororities such as the Fraternity/Sorority Advisor. Make sure you are aware of whom this person is and that you have the correct phone numbers. If it is the middle of the night, you may wait until the morning to reach out, in most situations.</p> <p>Consult your Regional Team and Headquarters before reporting a sexual assault to campus staff. They will assist you in navigating campus reporting policies. Pi Beta Phi always wants to ensure the safety and well-being of all members and recognizes there could be campus or community experts who can be resources for your members.</p>
<p><b>PHONE CALL 4: PI BETA PHI EMERGENCY HOTLINE</b></p>	<p>The <b>fourth phone call</b> is to the Pi Beta Phi Emergency Hotline: (636) 236-9463, for those emergencies that warrant a call to the hotline (as outlined throughout this document).</p> <p>The Emergency Hotline is monitored after business hours by Headquarters staff. If you do not reach a live person, please leave a detailed voicemail with information about the situation.</p> <p>The purpose of calling the Emergency Hotline is to share information with Headquarters staff who will then distribute updates to the appropriate individuals on your Regional Team, along with other volunteers and Headquarters staff. Those carrying the phone are not experts and may not be able to advise on what to do in an emergency situation. However, they are trained to disseminate information and connect you with the right Pi Phi volunteers and staff.</p>





# PI BETA PHI EMERGENCY PROCEDURES

## WHEN TO CALL THE EMERGENCY HOTLINE

When a new or initiated member is taken to the hospital for a serious emergency (unplanned, not routine visit), or is injured on Pi Phi property or at a Pi Phi event, **a call to the Pi Beta Phi Emergency Hotline: (636) 236-9463 must be placed immediately.** Please consult the examples below.

The caller will be asked to provide details around the situation; please be prepared to provide as much clear and factual information to the hotline as possible. If the phone is not answered, please leave a detailed voicemail and a Headquarters staff member will return your call. The phone is monitored after business hours, which end at 5 p.m. CST, but staff members monitoring the phone live in all time zones. **If you call the hotline overnight, you may receive a call back the next morning.**

### WHEN TO CALL THE HOTLINE

#### EXAMPLES OF REASONS TO CALL THE EMERGENCY HOTLINE:

- If the member is transported via ambulance from the chapter facility for ANY reason or a member is hospitalized for injury on Pi Phi property or at a Pi Phi event
- Alcohol or drug-related medical attention/hospitalization
- Life threatening injury or illness
- Suicide attempt or hospitalization due to other mental health crisis
- Sexual assault
- Campus crisis, local emergencies (such as weather or security threat)
- Facility issues/threats
- Other serious emergencies including member death or a missing member
- Serious and urgent media issue

### WHEN NOT TO CALL THE HOTLINE

#### EXAMPLES OF REASON YOU USUALLY DO NOT NEED TO CALL THE EMERGENCY HOTLINE:

- A hospitalization for a minor issue (e.g. stomach pain, allergic reaction) from somewhere other than the Pi Phi facility or a Pi Phi event, such as from home, residence hall, etc.
- A member is arrested (unless she's been arrested from the house)
- If you are with a member and you are not sure if they should go to the hospital—call the police or 911 instead. Those answering the Emergency Hotline are not the best individuals to help from afar. Call the hotline if the member is transported.

If you are not sure, it is better to call the hotline than to not. When a new or initiated member is taken to the hospital for a non-emergency or non-life-threatening injury, **an email should be sent to your AAC Chair**, who may consult or inform the Regional Team, if necessary.

### REPORTING ISSUES AT A LATER TIME

All chapters are expected to call the Emergency Hotline immediately when they learn of an emergency in the chapter. Do not wait to call the hotline.

In some circumstances, you may learn of a hospitalization or issue that happened days or weeks ago. In this case, inform your AAC and follow your campus protocol and then call the Emergency Hotline **during business hours**. Avoid calling the Emergency Hotline in the middle of the night to report something that did not happen recently.





## PI BETA PHI EMERGENCY PROCEDURES

### WHEN A MEMBER NEEDS TO BE TAKEN TO THE HOSPITAL

#### STEPS TO TAKE

If a New Member or initiated member must be taken to the hospital for any reason, she should be accompanied by another member, preferably a chapter officer, unless your campus policies dictate otherwise.

Those who accompany her should be reminded that medical officials will contact parents. While the inclination may be for many concerned chapter members to accompany the individual or wait at the hospital, only one or two members should be present. They should relay information to the Chapter President. This helps ensure the individual's privacy as well as limit possible external attention.

When a new or initiated member is taken to the hospital for the **reasons listed in the previous section**, a call to the Pi Beta Phi Emergency Hotline: (636) 236-9463 must be placed immediately.

When a new or initiated member is taken to the hospital for a non-emergency or non-life-threatening injury, an email should be sent to your AAC Chair, who may consult or inform the Regional Team if necessary.

### SERIOUS INJURY OR DEATH OF A MEMBER

#### STEPS TO TAKE

The Chapter President or AAC must notify Headquarters of any serious injury or death of members of Pi Beta Phi—or any serious injuries or deaths of others that occur in Pi Beta Phi facilities or at any event sponsored by Pi Beta Phi—by placing a call to the Pi Beta Phi Emergency Hotline: (636) 236-9463.

- In the case of serious injury or death of a member, the chapter may receive media inquiries. For that reason, Pi Beta Phi's media experts at Headquarters will proactively reach out to the Chapter President to support them in handling these inquiries.
- The AAC and Regional Team will support the Chapter President and members in processing the loss of a member. This may include understanding the wishes of the member's family at their services.
- Pi Phi has a memorial service for a collegian that is included in the Resource Library that you might want to share with parents or conduct for the chapter.
- If the member lived in chapter housing, please do not remove their personal belongings and keep the room locked and closed to all but police or other officials, if involved. See that any roommates are temporarily moved. Work with the family on removing belongings.





# EMERGENCY PROCEDURES

## INCIDENT AT THE CHAPTER FACILITY/SECURING THE FACILITY

**CHAPTER  
PRESIDENT,  
VICE PRESIDENT  
FINANCE/  
HOUSING STEPS**

If an accident occurs, secure the chapter facility immediately. Make note of who is present, monitor exits and provide instructions. Inform the House Director right away and work together to handle the situation. This is to ensure a safe environment.

- Allow only members or appropriate officials to enter the facility.
- Make certain that the accident victim is not disturbed by untrained people.
- Keep curious onlookers away and protect her privacy. If there is a break-in, serious vandalism, etc. creating a crime scene, it will help if people are not coming and going.
- If possible, have an AAC member or House Director present when the appropriate medical assistance or police arrive.
- Notify the campus Fraternity/Sorority Advisor of the incident if emergency services are called to the chapter facility.
- Call the Emergency Hotline for all facility-related emergencies.
- Notify the chapter members (both live-in and live-out) for facility issues/ threats of the safety of the facility and to clear up any confusion surrounding the incident.
- Ensure the Chapter House Corporation or Fraternity Housing Corporation are aware of the situation.



## STATEMENTS TO THE MEDIA AND ON SOCIAL MEDIA

<p><b>POTENTIAL MEDIA INVOLVEMENT</b></p>	<p>The Chapter President is the spokesperson for the chapter during an emergency. However, it is critically important that they consult with Headquarters staff before commenting or elaborating on the situation to media.</p> <p>After serious emergencies, media involvement should be anticipated and Pi Phi strives to be prepared before inquiries are received, when possible. Only the Chapter President or Headquarters staff should speak for the chapter. A carefully worded statement must be formulated with the advice and consultation of media experts at Headquarters.</p> <p>The chapter must know the importance of the Chapter President as the chapter's spokesperson.</p>
<p><b>IF APPROACHED BY THE MEDIA</b></p>	<p>When meeting with the media or outsiders, be mature, brief, confident and cautious.</p> <ul style="list-style-type: none"> <li>• Speak briefly and succinctly.</li> <li>• Maintain the privacy of member(s) involved. Keep details, names and opinions to yourself.</li> <li>• Write down all questions, get the reporter's deadline and let them know someone will get back to them.</li> <li>• Do not say "no comment" or ignore the inquiry.</li> <li>• Follow the proper process for making the Fraternity aware of the situation (below).</li> </ul>
<p><b>MAKING SOCIAL MEDIA STATEMENTS</b></p>	<p>A chapter should not make a post on social media about a member or chapter emergency before consulting with Pi Beta Phi Headquarters. During emergencies, social media posts have the potential to violate a right to privacy and could be taken out of context by media or other non-members.</p> <p>Refer to the <a href="#">Social Media Guide</a> in the Resource Library for more information on crafting chapter social media posts on social justice movements and causes. Posts of this type <b>must be</b> reviewed by the regional Community Relations Specialist before being posted.</p>
<p><b>WHO TO CONTACT</b></p>	<p>With this information, contact Pi Beta Phi Headquarters immediately to consult on an appropriate statement at (636) 256-0680. Tell the person answering the phone you have an urgent media inquiry. Do not wait to contact Headquarters, as developing a response may take some time.</p> <p>Email inquiries can also be forwarded to <a href="mailto:press@pibetaphi.org">press@pibetaphi.org</a>, but also follow up with a phone call to Headquarters at (636) 256-0680.</p>



# OH NO! THERE'S AN EMERGENCY! WHAT DO I DO?

SITUATION	EMERGENCY PROCEDURE





## ACTION PLAN

### WHAT IS ONE THING I WANT TO IMPLEMENT?

- Immediately upon returning back to my chapter:

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- By the time spring term ends:

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- By the end of my officer term:

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- Other things to consider:

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## MY NETWORK

1. **Name:** \_\_\_\_\_

2. **Email/Phone:** \_\_\_\_\_

3. **Chapter and Size:** \_\_\_\_\_

4. **Housing Type:** \_\_\_\_\_

5. **Housing Size:** \_\_\_\_\_

1. **Name:** \_\_\_\_\_

2. **Email/Phone:** \_\_\_\_\_

3. **Chapter and Size:** \_\_\_\_\_

4. **Housing Type:** \_\_\_\_\_

5. **Housing Size:** \_\_\_\_\_

1. **Name:** \_\_\_\_\_

2. **Email/Phone:** \_\_\_\_\_

3. **Chapter and Size:** \_\_\_\_\_

4. **Housing Type:** \_\_\_\_\_

5. **Housing Size:** \_\_\_\_\_







**NOTES**

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NOTES

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1867

ΠΒΦ

HONOR  
and  
RESPECT

lifelong  
COMMITMENT

INTEGRIT

Sincere  
friendship

Pi  
Beta  
Phi

PERSONAL AND  
INTELLECTUAL  
growth

LEADERS  
life

ΠΒΦ

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