



Friday January 18, 2019	
Time	Session
11:00 a.m.	Facilitator arrival to camp
12:00 - 1:00 p.m.	Facilitator welcome and lunch
1:00 - 1:30 p.m.	Weekend philosophy and expectations
1:30 - 2:00 p.m.	General facilitator training
2:00 - 4:00 p.m.	Facilitator has time with curriculum
4:00 - 11:00 p.m.	Check-in open
5:00 p.m.	LTW kick-off & welcome
5:30 - 6:30 p.m.	Dinner
6:30 - 7:00 p.m.	Announcements & updates
7:00 - 9:00 p.m.	Round tables part 1
9:00 - 11:00 p.m.	Officer tracks
9:00 - 9:30 p.m.	Session 1: Introductions & icebreakers
9:30 - 9:45 p.m.	Session 2: Weekend overview & expectations
9:45 - 10:15 p.m.	Session 3: CFO philosophy
10:15 - 11:00 p.m.	Session 4: Steps to budgeting

Saturday January 19, 2019	
Time	Session
8:00 - 9:00 a.m.	Breakfast
9:00 - 10:00 a.m.	Round tables part 2
10:00 - 12:00 p.m.	Officer tracks
10:00 - 10:45 a.m.	Session 5: Golden rules of goal setting
10:45 - 11:30 a.m.	Session 6: Values-based budgeting
11:30 - 12:00 p.m.	Session 7: Budget transparency
12:00 - 1:00 p.m.	Lunch
1:00 - 2:00 p.m.	Round tables part 3
2:00 - 5:00 p.m.	Officer tracks



Saturday January 19, 2019	
Time	Session
2:00 - 2:30 p.m.	Session 8: Treasurer techniques
2:30 - 3:00 p.m.	Session 9: Effective communication
3:00 - 3:30 p.m.	Session 10: Prioritization
3:30 - 3:45 p.m.	Session 11: Adaptability
3:45 - 4:45 p.m.	Session 12: Accountability & effective confrontation
4:45 - 5:00 p.m.	Session 13: Parking lot & questions
5:00 - 6:00 p.m.	Dinner
6:00 - 6:30 p.m.	Announcements
6:30 - 7:00 p.m.	TEF Thank You Letter Writing
7:00 - 11:00 p.m.	Officer tracks
7:00 - 7:30 p.m.	Session 14: Introducing Bill Highway
7:30 - 8:30 p.m.	Session 15: National fees & deadlines
8:30 - 9:30 p.m.	Session 16: Finance education
9:30 - 10:00 p.m.	Session 17: Budget work
10:00 - 11:00 p.m.	Treats & Talks with National Council

Sunday January 20, 2019	
Time	Session
8:00 - 9:00 a.m.	Officer tracks
8:00 - 9:00 a.m.	Session 18: Using your resources
9:00 - 9:40 a.m.	Session 19: Financial round tables
9:40 - 10:00 a.m.	Wrap Up & Conclusion
10:00 - 11:00 a.m.	Brunch
11:00 - 12:00 p.m.	General Speaker: T.J. Sullivan; Confronting the Idiot In Your Chapter
12:00 - 12:30 p.m.	Wrap Up & Final Announcements
12:30 p.m.	Dismissal



Thank You.

These two simple words convey so much, but not ever enough. Thank you for sharing your time, talent, and knowledge in an effort to educate and strengthen the future of Triangle Fraternity.

Leadership & Training Weekend is a perfect opportunity for us to work closely and collaboratively with our chapter leaders through officer training, leadership development and brotherhood bonding. Chapter Presidents, New Member Educators, Vice Presidents, Risk Managers, Service Chairs, Programmers, Recruitment Chairmen, Treasurer's and Chapter Advisors will spend the weekend discovering more about themselves, their chapter role, and their fraternity.

If this is your first time at LTW get ready for a fun and cold weekend.

If this is not your first time- strive to make it your best weekend yet. Each experience presents a new opportunity to grow, develop, and make new friends.

Triangle is committed to creating better men, in an effort to build a better world. This is why we do programming such as Leadership & Training Weekend. It is our goal to equip our men with the knowledge, skills, and resources to transform their chapters, their brothers, and their selves.

So, thank you for taking the weekend to focus your mind and immerse yourself in this educational leadership experience for not only our undergraduates but hopefully for you as well.

I appreciate you, friend.

Ariel Tarosky
Director of Education & Communication
Triangle Fraternity



Leadership & Training Weekend Overview.

Leadership & Training Weekend is comprised of six different tracks that will focus on various themes and concepts. The most significant are listed below.

LTW Philosophies

While different tracks, each is built on the following philosophies:

1. Learning is the primary objective of the Leadership & Training Weekend. LTW curriculum has been designed to provide chapter and colony officers with the tools and resources that will assist them in their position.
2. Soft-skill development is a key function of the fraternity experience. Thus, LTW curriculum has been designed to assist participants beyond the fraternity experience.
3. During LTW, participants should have the opportunity to think individually and organizationally.
4. Authentic conversation will be necessary to assist and support members in their leadership positions.
5. Leadership is servant based. In order for chapter officers to be successful in their roles, they need to serve their chapter members and the mission of Triangle Fraternity.

Learning Outcomes

Steven L. Miller Presidents' Leadership Academy

1. By attending this program, participants will be able to identify their leadership style and how to work with other individuals effectively.
2. By attending this program, participants will be able to effectively communicate with their stakeholders.
3. By attending this program, participants will be able to identify steps to effectively problem solve issues.
4. By attending this program, participants will be able to identify effective and efficient ways to manage risk in their organization.
5. By attending this program, participants will be able to identify ways to effectively delegate to their organization's membership.
6. By attending this program, participants will be able to identify coping strategies for dealing with critics.

Elevate Recruitment Workshop

1. By attending this program, participants will be able to identify their leadership style and how to work with other individuals effectively.
2. By attending this program, participants will be able to identify key stakeholders for their organization.
3. By attending this program, participants will be able to establish a referral system to attract new members for their organization.
4. By attending this program, participants will be able to start and hold meaningful and engaging conversations.
5. By attending this program, participants will be able to identify and sell their organizations brand.
6. By attending this program, participants will be able to teach their members how to effectively recruit new members into their organization.



Lifestyle & Education Workshop

1. By attending this program, participants will be able to identify their leadership style and how to work with other individuals effectively.
2. By attending this program, participants will be able to effectively and efficiently plan and implement an event or program for their organization.
3. By attending this program, participants will be able to identify the different needs and interests of their organizations members.
4. By attending this program, participants will be able to create a safe and healthy fraternity experience for their members.
5. By attending this program, participants will be able to offer a diverse range of workshops, programs, and brotherhood events for their organization.
6. By attending this program, participants will be able to deliver meaningful service to their community.

Finance Workshop

1. By attending this program, participants will be able to identify their leadership style and how to work with other individuals effectively.
2. By attending this program, participants will be able to identify the key responsibilities of serving as their organization's treasurer.
3. By attending this program, participants will be able to identify ways to effectively communicate to their organizations members.
4. By attending this program, participants will be able to identify the seven steps to effective confrontation.
5. By attending this program, participants will be able to create and manage a budget that follows the values of the organization.
6. By attending this program, participants will be able to identify two national opportunities to receive chapter funding and support.

The John Wakerly & Kahlert Family First Advantage Workshop

1. By attending this program, participants will be able to identify their leadership style and how to work with other individuals effectively.
2. By attending this program, participants will be able to effectively and efficiently plan and implement an event or program for their organization.
3. Participants will focus on two primary vehicles of active service learning: organizing & implementing the Leadership Advantage Program on their campus and getting involved with FIRST. Both vehicles will include:
 - Program history and awareness
 - Information around logistics for organization and implementation
 - Skill development as organization leaders
 - Creating strategic partnerships with stakeholders, including the importance of women in STEM
 - Developing an organizational brand through program experiences.



Facilitator Role.

1. Effective LTW facilitators are guides to help participants move through an insightful, challenging, and rewarding experience.
 - Attention is placed on the students, not on themselves.
 - Participants are fully engaged, attentive, and actively participating.
 - Participants are allowed to struggle with issues are encouraged to find personal answers.
 - Facilitators are comfortable with silence during discussion and allowing students the opportunity to fill the void.
2. Effective LTW facilitators are full participants right along with students and co-facilitators.
 - Facilitators sit among students in general sessions and at meals.
 - Facilitators complete worksheets, reflections, and participate in learning activities.
 - Facilitators do not reminisce or attempt to create past experiences.
 - Facilitators use unscheduled time to connect with participants.
 - Facilitators do not disappear during downtime/breaks, but remain with the group and encourage interactions.
3. Effective LTW facilitators serve as positive role models for each other and participants.
 - Relationships with participants are professional and appropriate.
 - Unacceptable/inappropriate behavior is confronted and addressed.
 - Educational tracks are not used to advance personal agenda.
 - Facilitators work to ensure inclusion by not becoming cliquish, spending down time away from the group, dining separately, or not following established guidelines/expectations.
 - Facilitators are on time (early) for all sessions.
 - Facilitators remain on-site for the duration of the weekend.
 - The substance free policy is support and enforced.
4. Effective LTW facilitators trust the process and allow the weekend to unfold and take its course.
 - Do not over-process or over-analyze each situation.
 - Stay focused on the participants and serve as a guide for all.
 - Do not compare track experiences - each has different learning outcomes and will develop its own personality.
 - Anticipate feelings of skepticism, frustration, fear, being overwhelmed, and affirm each feeling as its experienced.



Facilitation 101.

Facilitation is:

- Supporting the curriculum through discussion and activities
- Creating connections of shared information & experiences
- Helping participants get good information and affirmation
- Providing focus and direction
- Appropriately challenging and questioning participants

Facilitation is NOT:

- “Doing” for the participants
- Being an expert on all topics
- Allowing discussion to meander off-topic
- Defensive, argumentative, or polarizing

Effective facilitators should be:

- Natural and genuine
- Interested in all participants
- Engaged in a series of conversations with a variety of participants
- Clear and non-judgmental in their communication
- Flexible and able to adapt to different situations
- Focused on the participant’s experiences and struggles
- Developing appropriate relationships with participants and facilitators

Facilitators will exhibit good communication skills by:

- Expressing ideas clearly and accurately
- Being attentive and showing interest in the subject
- Thinking quickly on their feet and being prepared for difficult confrontations and conversations
- Showing a sense of humor
- Knowing when to steer conversations in a serious tone

Facilitators will regulate personal remarks to:

- Calling the group’s attention to helpful statements
- Rephrasing participant’s ideas/thoughts to clarify and reinforce
- Summarizing groups thoughts to bridge between topics
- Facilitators will avoid emphasizing personal opinions, agendas, etc.

Additionally, facilitators will:

- Ensure participation by each group member during educational tracks
- Ensure that one individual does not dominate the conversation
- Maintain eye contact with group members and ensure personal body language is welcoming to the group
- Be alert to the body language and cues from participants
- Create a climate of respect within the group that allows participants to discuss differences, without attacking

Facilitation 101 cont.

- Show interest in the opinions of all group members
- Ensure that there is no favoritism within the group
- Allow participants to share minority views comfortably
- Help participants view/discuss issues from many angles before reaching conclusions
- Provide meat for discussions without dominating the conversation
- Provide examples and ideas from personal experiences to emphasize points
- Listen critically to discussions to identify confusions
- Gently encourage participants to question the validity of their arguments or reasons
- Help participants examine their current realities that are outside the norm

Common Group Dynamics.

Silence

- Trust silence when it occurs. Often this is a signal that learning is occurring and you've identified a difficult conversation. Give participants time to form their thoughts.
- Count to 10 before asking another question or filling the void. When the silence becomes uncomfortable to the group, someone usually steps in. Wait for it.

Disruptive Group Members

- Handling disruptive behaviors is often difficult. The key is to handle the disruption without hurting the individual and/or group.
- Keep in mind that you are not alone and are bound to have allies in the group. Use these allies to bring the discussion back to a constructive place.
- Private conversations outside of the group meeting might be necessary with the disruptive person.

Dominating Conversation

- Some participants might over participate or dominate conversations. Use techniques to balance conversation or change how you ask questions to encourage others to participate as well. One-on-one conversations with dominant group members outside of the meeting space might be necessary.

Negativity

- If a participant is relentlessly negative and skeptical, use techniques that involve participants in problem solving and identifying ways to be optimistic. Do not allow the group to succumb to negativity. Give the complainer constructive feedback outside the group if the negativity impacts the group.

Side Conversations

- Side conversations can negatively impact the group. Facilitators can use several techniques including eye contact with the small group, having the group move around to mix the group, involving the smaller group by asking them a direct question, and/or discussing the issue outside the group during a break.

Managing Discussions

- Make sure everyone understands the topic and there is agreement about the idea.
- Use flip charts to manage discussion and topics.
- Use the "parking lot" method to "park" thoughts or ideas that are off topic.
- Summarize discussion periodically.

Managing Transitions

- Ensure the first discussion has some sort of closure and group is ready to move on.
- Make segue clear by using links between topics.
- Identify strategic moments in discussion to make transitions.

Using the Group's Energy

- Allow the group conversation to roll as long as it is productive.
- Encourage physical activity to maintain energy. Get up and move between conversations.
- Provide energizers for groups that are tired, uninvolved.
- When conversations become animated and/or heated, don't immediately diffuse them. Allow for some conflict to move the conversation forward. Step in when conversation is no longer constructive.
- Listen for signs that the group is ready to move on to a new topic.



General Expectations.

1. Please attend all of the sessions. We want to be sure to model the way for our active members. Should you have a work or personal emergency, please feel free to take care of them.
2. We can't stress enough the importance of following the schedule. Every session is important for our participants, and we also want to be respectful of everyone's time. If it is your responsibility as a facilitator to be mindful of your time and to guide discussion effectively.
3. Please take attendance at the start of every session. Participants must attend the session that they registered for and should not be switching sessions throughout the weekend. Please make note of who is there that shouldn't be and who is missing and inform a HQ staff member.
4. Staff members, councilmen, and guests may be dropping in to your session to take pictures, or to participate in the discussion. You have the right to ask visitors to leave should you feel it is prohibiting open and honest discussion among group members.
5. We ask that you follow the substance-free weekend policy.
6. Maintain professional relationships with participants. While we encourage brotherhood development and having fun, we want to make sure that all behaviors of our facilitators are professional and appropriate as it is a reflection on the National organization and quality of our programs. Plus, you are modeling the way for the behavior of our active members.

Additional Resources.

Wireless Information

- Main Camp
 - JamesonCampWIFI | jcinternet

Peace Center

- JamesonCampPeaceCenterWIFI | jcpeacecenter

Cabins

- JamesonCampCabinWIFI | jc7cabins



Session 1

Friday, January 18 | 9:00 - 9:30 p.m.

9:00 - 9:15 p.m. Introductions	
	<i>Welcome participants with high energy.</i>
INTRO	<p>Our time together this weekend, while short, is extremely valuable. It is our hopes that we all feel comfortable enough with one another to ask questions, share tips, and push back.</p> <p>But before we can do that we should introduce ourselves.</p>
ACTIVITY	<p><i>Facilitators should begin and end introductions by covering:</i></p> <ul style="list-style-type: none"> • Name • Role/title • Chapter • What you hope to accomplish at LTW • Strange fun fact
9:15 - 9:30 p.m. Icebreaker: Crumple & Shoot	
OVERVIEW	<i>Ask your group a question. In groups, participants agree on an answer and write it on a paper (one paper per group). At your signal, all groups hold up their answers at the same time. Every group that answers correctly sends one person up to the front of the room with their paper. They crumple it up and shoot it into the trash can. If they can make it in, their team gets a point. The team with the most points at the end of the game wins.</i>
SUPPLIES	<i>Stack of postcard paper, butcher paper for scoring, trash can, painters tape, list of questions & answers</i>
SETUP	<ul style="list-style-type: none"> • Arrange your students in groups 2-4 • Have each group come up with a group name • Create a scoreboard at the front of the room with each group name and place to tally points • Place a trash can in a central location, and put one or two strips of masking tape on the floor several feet away
RULES	<p><i>Go over rules and procedures with students, then start playing!</i></p> <ul style="list-style-type: none"> • Stay in seats at all times. Only shooters are allowed up • No heckling while other groups are shooting • Both of your feet must be behind the line until the ball leaves your hand; otherwise the shoot does not count • Only ONE sheet of paper per shot • Facilitator will ask a question • Group members discuss and agree on an answer, then write it legibly on one sheet of paper • After facilitator says "Answers Up!" one group member holds up the paper • If your answer is wrong, the facilitator will take your paper. If your answer is right, send up one person to crumple your paper and shoot it in the basket • If your shooter makes it, you get a point. The group with the highest points wins

DEBRIEF	<ul style="list-style-type: none">• Why do you think we did this icebreaker?• What benefits do you think you can gain from doing this icebreaker at the start of one of your programs?
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Session 2

Friday, January 18 | 9:30 - 9:45 p.m.

9:30 - 9:35 p.m. Weekend Overview	
	<i>Transition to talking about the weekend's content and the learning objectives that you hope to achieve.</i>
TRANSITION	Our goal this weekend is to provide you with the skills, resources, and framework to establish a strong financial program for your organization.
	We realize that several of you may be here for different reasons and that you may be in different places financially, both personally and in your organization, but we have created the curriculum in a way that will assist all of you no matter what skill level you are coming to us with.
	As we mentioned at the start of our evening, you will get out of this weekend what you put into it. Use all of your opportunities wisely. From goal planning with your executive board, to the consulting with alumni and staff, to our sessions together. Ask questions, share frustrations, and tell us about your successes.
WB PG 5	<i>Encourage your members to refer to their schedule in their workbooks.</i>
	<p>We will begin our time together taking a closer look at leadership and service separately and then what the two look like together.</p> <p>Then we will spend some time discussing what meaningful service looks like.</p> <p>After we have laid this foundation we will spend a majority of our time discussing the two primary vehicles in which our organizations can engage in meaningful service and philanthropy the Leadership Advantage Program and the FIRST Inspires Program.</p> <p>We will provide you with the history, background, logistics, and process for implementation for each program.</p> <p>We will then conclude our time together looking at the skills critical to your role.</p>
9:35 - 9:45 p.m. Expectations	
	<i>Transition to talking about expectations - both yours and the participants.</i>
TRANSITION WB PG 9	<p>Some of you covered this in your introductions, but we are curious about what your expectations for the weekend are.</p> <ul style="list-style-type: none"> • What encouraged you to attend? • What do you hope for from yourself? And of others? • What do you want from HQ, council, and/or other chapters?

	<p><i>Next spend some time covering your personal expectations, hopes, needs, and then finish by briefly discussing the expectations below.</i></p>
	<p>Some of these may be a repeat of your thoughts but the following are our expectations:</p> <ul style="list-style-type: none"> • That everyone is open and honest with their struggles, frustrations and questions. • That we are open-minded and realize that with every campus comes different rules, issues, struggles & successes. • That we not be afraid to challenge one another - including us as facilitators. • That everyone actively participates in the conversation. Be in the moment, turn your phones off and listen. • That you use your workbook and take notes - no one here knows everything, use this time as an opportunity to grow and develop personally and in your role. • That you continue to stay involved with HQ and this session's participants.
PARKING LOT	<p>One other important piece of this weekend that we need to discuss before we continue is the parking lot. We are aware that a lot of you may have questions that will come up this weekend. It is important that we both cover the intended curriculum and answer your questions. Therefore, we have created a parking lot. The parking lot is created to list your questions or topics that we will come back to at downtimes and at the conclusion of our programming.</p> <p>We ask that your questions/topics are relevant to our mission and overall objective.</p>



Session 3

Friday, January 18 | 9:45 - 10:15 p.m.

9:45 - 10:00 p.m. The CFO Philosophy	
	<ul style="list-style-type: none"> What do you believe are the primary roles & responsibilities of the CFO? What do you believe are the hardest tasks that the CFO must fulfill? What do you feel the CFO needs more training on?
	<p>Serving as the chief financial officer for your organization is one of the most important roles in the organization. Upon your shoulders rests not only the financial well-being of your organization for the current year, but also the future of your organization. As the CFO you should develop a routine complete with:</p> <ol style="list-style-type: none"> 1. Consistent financial recording 2. Reporting to the Advisory Board and President 3. Preparing an Annual Budget 4. Procedure for billing and collection of accounts from members 5. Making sure all Accounts Payable are paid, and paid on time 6. Prepare and file the organizations taxes in a timely manner
	<p>The CFO's position requires strong discipline and attention to detail. Financial records must be consistent and accurate. There will be times when your leadership will threaten your relationships with some of your members. To become and remain effective in your role, you must not allow your personal biases or friendships affect the efficiency of your responsibilities. You must study in depth the problems or situations and make informed decisions.</p>
	<p>The CFO does not have to be an accountant or business major, but rather a member who will be dedicated, conscientious, and willing to keep the organization's finances in control. If you ever find yourself 'backed in a corner' or have a question regarding a bookkeeping procedure, look to an alumnus, professor, or professional accountant/businessperson, they should prove to be excellent resources.</p>
	<p>As we have been alluding to, the CFO is not just responsible for creating the budget and collecting dues. The CFO has a key role in the strategic and tactical development of the organization as it relates to budget management, cost benefit analysis, and forecasting needs and the securing of new funding.</p>
	<p>A bit later we are going to expand on this idea, and how you can ensure that your budget is aligning with the needs of your organization and setting you up for long-term success.</p>
10:00 - 10:15 p.m. Responsibilities & Expectations	
WB PG 10	<p>If you turn to your workbooks you will find a list of additional responsibilities and expectations. Let's take some time to go through these and discuss them.</p>
	<p>Facilitators should have volunteers read each one and the description, explain what that looks like for them, and talk about if they find that to be a challenging or easy task. At the conclusion of the list ask them to share if there are any responsibilities that they have that aren't listed.</p>

	<ol style="list-style-type: none"> 1. Inform all members, including newly on boarded members of their financial obligation to the organization. 2. Collect all monies owed to the organization, including those from members that may have graduated or left owing money, in a timely manner. 3. Fulfill payment of all accounts payable in a timely manner. 4. Prepare a balanced budget by the beginning of each year to ensure the organization does not incur debt. Make sure each officer is aware of the money that has been budgeted for them to work with. 5. Maintain a complete and organized set of bookkeeping records. 6. Prepare and file the organizations taxes to remain income tax exempt. Typically form 990 or 990-n should be completed by Tax Day each year. 7. Complete a financial audit for records. 8. Submit insurance fees to National organization. 9. Be familiar with and enforce all rules and regulations concerning finances set by the National organization and your local organization. 10. Delegate appropriate tasks and responsibilities to an assistant to help in fulfillment of all duties and responsibilities. 11. Submit required fees to the National organization by the listed deadlines. 12. Maintain good financial relations with the university and governing council by paying bulls by the due date. 13. Prepare and deliver an officers report at each executive committee and weekly organization meeting. 14. Be aware of all organization obligations concerning financial matters and guarantee that your successor is aware of these as well.
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Session 4

Friday, January 18 | 10:15 - 11:00 p.m.

10:15 - 10:20 p.m.	Why You Should Prepare an Annual Budget http://ctb.ku.edu/en/table-of-contents/finances/managing-finances/annual-budget/main
	<p>Obviously, one of the primary responsibilities of the CFO is creating the budget. But why is it so important? Why can't you just track how much money you have and what you spend?</p>
	<p>It is important that as an organization you create accurate and up-to-date annual budgets so that you can maintain control over your finances, and so that you can show your members exactly how their money is being used.</p>
	<p>Preparing an annual budget:</p> <ul style="list-style-type: none"> • Sharpens your understanding of your goals • It gives you the real picture – by accurately showing you want you can afford and where the gaps in funding are, your budget allows you to plan beforehand to meet needs, and to decide what you're actually able to do in a given year • It encourages effective ways of dealing with money issues – by showing you what you can't afford with known income, a budget can motivate you to be creative – and successful – in seeking out other sources of funding • It fills the need for required information – the completed budget is a necessary element of funding proposals and reports to funders and the community • It facilitates discussion of the financial realities of the organization <p>It helps you avoid surprises and maintain fiscal control</p>
10:20 - 10:35 p.m.	The First Steps of Budgeting
	<ul style="list-style-type: none"> • What are the steps that you use when creating your budget? • What the key items that go into creating a budget?
	<p>It can be daunting to start the process of creating a budget, especially if you're not familiar with some of the common accounting and budget terminology you will encounter. (Let participants know we includes some helpful terms in their workbooks).</p>
WB PG 11	<p>How specific and complex the actual budget document needs to be depends on how large the budget is, how many member you have and what their requirements are, how many different programs or activities you're using the money for, etc. At some level, your budget will need to include the following:</p> <ul style="list-style-type: none"> • Projected expenses • Projected income • The interaction of expenses and income • Adjustments to reflect reality as the year goes on

	<p>Projected Expenses This is the amount of money you expect to spend in the coming fiscal year, broken down in the categories you expect to spend it in- programs, events, national fees, etc. Fiscal year simply means “financial year,” and is the calendar you use to figure your yearly budget and which determines when you file tax forms, get audited, and close your books. You’ll want to prepare your budget specifically to cover your fiscal year, and to have it ready before the fiscal year begins.</p> <p>Projected Income The amount of money you expect to take in for the coming fiscal year, broken down by sources- i.e. the amount you expect from each funding source, including not only dues, but also your own fundraising efforts, grants, and sales of goods or services.</p>
	<p>The interaction of Expenses & Income What gets funded from which sources? If you have a Chapter Endowment Fund CEF (which we will talk about later) that only covers educational programs so you will want to consider that as you create your budget. If funding comes with restrictions, it is important to build those into your budget, so that you can make sure to spend the money as you’ve told the funder you would.</p>
	<p>Adjustments to Reflect Reality as the Year Goes On Your budget will likely begin with estimates, and as the year progresses, those estimates need to be adjusted to be as accurate as possible to keep track of what is really happening.</p>
10:35 - 10:50 p.m.	Some Practical Considerations
	<p>The most important part of creating a budget is planning. While it would be nice to be able to just slap together some number and allocate monies to different programs you have to plan, and you should plan months if not semesters in advance.</p> <p>Before you begin your budget, there are some practical considerations to consider.</p>
	1. Start with the Preliminaries: What will you need to spend money on next fiscal year?
	<p>Step 1: Develop ways of estimating your expenses</p> <p>Estimate your expenses for the coming fiscal year. In some cases – yearly insurance, fees, rent, for instance – you’ll probably have real figures for what these expenses will be. In other cases – supplies, program costs, etc. – you’ll have to estimate average costs.</p> <p>Be sure to add in some money in a “miscellaneous” category, in order to be prepared for the unexpected. There are always expenses you don’t anticipate, and it is part of conservative estimation to make allowances for them.</p>
	<p>Conservative estimation: When preparing a budget, try to be as accurate as possible. Always use actual figures if you have them, and when you don’t, estimate conservatively for both expenses and income.</p> <p>When you estimate expenses, guess high – take your highest cost from previous years and round up. By the same token, when you’re estimating income, guess low- the smallest number realistically possible. Estimating conservatively when you plan your budget will make it more likely that you stay within it over the course of the year.</p>

	<p>Step 2: List the estimated yearly expense totals of the absolute necessities of the organization</p> <ul style="list-style-type: none"> • What are examples of these items? <p>Step 3: List the estimated expenses for things you'll need to actually conduct the activities of the organization</p> <ul style="list-style-type: none"> • What are examples of these? <p>Step 4: List estimated expenses for anything else the organization is obligated to pay or can't do without</p> <ul style="list-style-type: none"> • What would be examples of these costs? <p>Step 5: List estimated expenses for things which you aren't sure you can afford, but would like to do</p> <ul style="list-style-type: none"> • What are examples of these costs? <p>Step 6: Add up all the expense items you have listed</p>
10:50 - 10:55 p.m.	Putting it All Together
	<p>Now that you have an idea of your expenses and your income you need to put it all together and get it all down on paper (or on your computer). If your budget is going to be useful, it has to be organized in such a way that it can tell you exactly how much you have available to spend in each expense category.</p> <p>The easiest way to do this is by using a grid, usually called a spreadsheet. In its simplest terms, a spreadsheet will have a list of funding sources along its top edge and a list of expense categories running down its left-hand edge, so that each vertical column represents a funding source, and each horizontal row represents an expense category. Where each column and row meet (this meeting place is called a cell), there should be a number representing the amount of money from that particular funding source (the column) that goes to that particular expense category (the row).</p>
	<p>You want to make sure that you compare your total expenses to your total income</p> <ul style="list-style-type: none"> • If your projected expenses and income are approximately equal then your budget is balanced • If your projected expenses are significantly less than your projected income, you have a budget surplus. This circumstance leaves you with the possibility of expanding or improving the organization, or of putting money away for when you need it. • If your projected expenses are significantly greater than your projected income, you have a budget deficit. In this case, you'll either have to find more money or cut expenses in order to run your organization in the coming year.
	<p>If you are in a budget deficit here are some tips for budget cutting</p> <ul style="list-style-type: none"> • Look first at those items that aren't essential to the running of the organization • Can you cut or cut down the amount of physical, tangible items you need to run the program, or cut the cost of services in some way? • Finally, if nothing else will serve to balance the budget, you
10:55 - 11:00 p.m.	Budgeting Questions & Wrap Up
	<p>Use this time for participants to open their organization's budget and make any adjustments, ask questions, etc. Then you can dismiss them for the evening. Should you end early, remind them to not disrupt any of the other tracks. Thank them for a good first night.</p>



Session 5

Saturday, January 19th | 10:00 - 10:45 a.m.

10:00 - 10:30 a.m.	Golden Rules of Goal Setting
	Last night we spent a majority of our time discussing how to create a budget for your organization. We talked about predicting your expenses and income and to ensure that your budget is balanced.
	A huge part of creating your budget is goal setting. If you want to succeed, you need to set goals. Without goals, you lack focus and direction. <ul style="list-style-type: none"> • How can setting goals help you financially?
	Goal setting not only allows you to take control of your financial direction but it also provides you with a benchmark for determining whether you are actually succeeding.
	To accomplish your goals, however, you need to know how to set them. You can't simply say, "I want" and expect it to happen. Goal setting is a process that starts with careful consideration of what you want to achieve, and ends with a lot of hard work to do it.
	In between, are some very well defined steps that transcend the specifics of each goal. Knowing these steps will allow you to formulate goals that you can accomplish.
	Here are five golden rules of goal setting:
	1. Set goals that motivate you/your organization When you set goals for yourself, it is important that they motivate you: this means making sure that they are important to you, and that there is value in achieving them. If you have little interest in the outcome, or they are irrelevant given the larger picture, then the chances of you putting the work to make them happen are slim. Motivation is the key to achieving goals.
	Set goals that relate to the high priorities in your life/organization. Without this type of focus, you can end up with far too many goals, leaving you little time to devote to each one. Goal achievement requires commitment, so to maximize the likelihood of success, you need to feel a sense of urgency and have an "I must do this" attitude. When you don't have this, you risk of putting off what you need to do to make the goal a reality.
	<ul style="list-style-type: none"> • How can you make sure your goal is motivating?
	Tip: to make sure your goal is motivating, write down why it's valuable and important to the organization. You can use the motivating value statement to help you if you start to doubt yourself or lose confidence in your ability to make the goal happen.
	2. Set SMART goals You have probably heard of SMART goals already, but do you always apply the rule? The simple fact is that for goals to be powerful, they should be designed to be smart.

	<ul style="list-style-type: none"> • What makes a goal smart?
WB PG 12	<ul style="list-style-type: none"> • Specific • Measurable • Attainable • Relevant • Time Bound
	Set Specific Goals Your goal must be clear and well defined. Vague or generalize goals are unhelpful because they don't provide sufficient direction. Remember, you need goals to show you the way.
	Set Measurable Goals Include precise amounts, dates, and so on in your goals so you can measure your degree of success. If you goal is simple defined as "to reduce expenses" how will you know when you have been successful? Without a way to measure your success you miss out on the celebration that comes with knowing you have actually achieved something.
	Set Attainable Goals Make sure that it's possible to achieve the goals you set. If you set a goal that you have no hope of achieving, you will only demoralize yourself and erode your confidence. However, resist the urge to set goals that are too easy. Accomplishing a goal that you didn't have to work hard for can be anticlimactic at best, and can also make you fear setting future goals that carry a risk of non-achievement. By setting realistic, but challenging goals, you hit the balance you need.
	Set Time-Bound Goals Your goals must have a deadline. Again, this means that you know when you can celebrate success. When you are working on a deadline, your sense of urgency increases and achievement will come that much quickly.
	3. Set Goals in Writing The physical act of writing down a goal makes it real and tangible. You have no excuse for forgetting about it. As you write, use the word "will" instead of "would like to" or "might".
	4. Make and Action Plan This step is often missed in the process of goal setting. You get so focused on the outcome that you forget to plan all of the steps that are needed along the way. By writing out the individual steps, and then crossing each one off as you complete it, you'll realize that you are making progress toward your ultimate goal.
	5. Stick With it! Remember, goal setting is an ongoing activity not just a means to an end. Build in reminders to keep yourself on track, and make regular time-slots available to review your goals.
10:30 - 10:45 a.m.	Ready, Set, GOAL
WB PG 13	<p><i>For the next 30 minutes have participants use the pages in their workbooks to do some goal setting work and translate it into budgeting.</i></p> <p><i>Feel free to bring the group back together to share.</i></p>



Session 6

Saturday, January 19th | 10:45 - 11:30 a.m.

10:45- 11:30 a.m.	Values-Based Budgeting
	It is no secret that there will be times that you are going to be pulled in several different directions as you create your budget. Every officer is going to feel that their position or their programs deserve the most money. But how do you really decide what officer and what program gets how much money?
	<ul style="list-style-type: none"> As an organization, how do you determine who/what gets what and how much money? What officer/program usually get the most money? Why? Has there ever been a time when you knew an initiative was getting too much money? How did you handle that situation?
	Before you every start thinking about creating the budget, it is important that as a leadership team you determine what the priorities and the values of the organization are. Are they academics? Philanthropy? Service?
	Use the goals that you set as an organization, look to your code of ethics, or refer to the values, these should all help you determine what your focuses should be set on for the upcoming year.
	So, what does this look like in action? If you review your budget and noticed that 80% of your money is dedicated to your winter formal and only 5% to academic and 0% to service are you really fulfilling the values and mission of the organization?
	<ul style="list-style-type: none"> What are the values or areas you should be focusing on for the upcoming year? How have you budgeted for these areas?
	Spend the next 30 minutes, considering what the values or focus areas of your organization are or should be and how you can designate funds for those areas for the upcoming year.
	Later we will discuss how to have the difficult conversations when people disagree with those focus areas.



Session 7

Saturday, January 19th | 11:30 - 12:00 p.m.

11:30 - 12:00 p.m.	Budget Transparency
	The budget is the single most important policy document; which makes budget transparency one of the most critical aspects an effective executive leadership. Budget transparency is defined as the full disclosure of all relevant fiscal information in a timely and systematic manner.
	Budget transparency, while not a goal in itself, is a prerequisite for public participation and accountability. A budget that is not transparent, accessible, and accurate cannot be properly analyzed. Its implementation cannot be thoroughly monitored nor its outcomes evaluated.
	<ul style="list-style-type: none"> Can you list a couple of tangible reasons why budget transparency is so important?
	Budget transparency and oversight over how resources are allocated and spent are powerful disincentives for officials to misuse or misappropriate funds since their actions are more likely to be scrutinized.
	Additionally, budget transparency allows members to provide feedback on the quality and adequacy of services and infrastructure provided. This feedback, combined with reduced corruption, results in more efficient use of resources.
	<p>The gesture of opening up your budget to the membership is likely to lead to more trust in the leadership and is also instrumental in generating higher revenues.</p> <p>So how is this done?</p>
	<ol style="list-style-type: none"> 1. Assess the existing level of budget transparency 2. Advocate for greater budget transparency 3. Disseminate available budget information in the most efficient way possible 4. Enhance the level of budget literacy among your members
	<p>Assess the existing level of budget transparency</p> <p>Make sure that you look through your current documents and determine what information members have received in the past. Have they ever received budgetary information before? Expenses? Income? A full overview?</p>
	<p>Advocate for greater budget transparency</p> <p>While you are the CFO you have to remember that you are part of a team- it would not be a good idea to just go and publish your budget one day- this could be a big change for your organization, depending on what you have done in the past. Make sure you have a conversation with the leadership team about what you want to disseminate and the best way to do it.</p>
	<p>Disseminate available budget information in the most efficient way possible</p> <p>When you are ready, it is time to publish the information to the membership. Do you do this by way of e-mail? By PowerPoint at a meeting? Or by a handout? If you have never provided budgetary information before, make sure you don't overwhelm your membership all at once, really think through how you want to present the information.</p>

	<p>Enhance the level of budget literacy among your members</p> <p>It is important that as you provide your members with this information that you explain to them what they are looking at. Let them know what the expenses are and why, and where the income is coming from. While things may make sense to you, it may not make sense to them so you need to be sure to explain every detail to them.</p>
	<p><i>At the conclusion of this session ask to see if there are any comments or questions. If there is time left over you can visit the parking lot. If there is none, you may dismiss to lunch for 12 p.m.</i></p>



Session 8

Saturday, January 19th | 2:00 - 2:30 p.m.

2:00 - 2:30 p.m.	Treasurer Techniques
	<p>As we break for lunch we want to leave you with some helpful techniques (some of which we have touched on already, some of which we will cover later) that will serve your time as treasurer well. When we return this afternoon, we are going to spend our time focusing on the skill set of treasurer as opposed to the operational side.</p>
WB PG 14	<ol style="list-style-type: none"> 1. Organization is the key 2. Use a Spreadsheet 3. Do not fall behind with updates and records 4. Get a system going 5. Do not be the bank 6. Don't be afraid to say no 7. Accountability will be key 8. Share financial records with your members 9. Delegate anything you can 10. Continually evaluate your budget 11. If you have questions get help
	<p>Organization is the key. Stay organized and keep on top of things. Plan enough time to do the work that needs to be done.</p>
	<p>Use a Spreadsheet. Every organization's records should be tracked using Excel, Google Docs, or some other spreadsheet program. For those more advanced or with larger budgets, programs like Quicken or QuickBooks are recommended.</p>
	<p>Do not fall behind with updates and records. Update financial records and file away bills every day. When someone gives you a check, take care of it immediately. It is much easier to stay ahead of the game than having to play catch up.</p>
	<p>Get a system going. You should update records and take of payments daily; deposit money at the bank and prepare a financial report for the organization weekly; and pay bills and make adjustments to the budget monthly. A regularly monthly treasurer routine also makes it easy for the organization to get on a regular routine of paying their bills on time, etc.</p>
	<p>Do not be the bank. Do not get in the habit of giving people extensions on their payment due date. The organization has to survive and it is their obligation as a member to make their payments on time. Under no circumstances should you be lending money to any member.</p>

	<p>Do not be afraid to say no.</p> <p>You will run into times where members ask for extensions or positions ask for more money or certain departments ask to dip into others to make something work. You have the best scope of your budget and what is best for the organization and there will be times that you will need to say no. Sometimes that will be to your best friend. But in order to keep your organization in a healthy financial setting that may be what is required of you.</p>
	<p>Accountability will be key.</p> <p>Just as your members are required to attend meetings, show up to class, and meet certain grade requirements to remain an active member of your organization, so too, must they meet their financial obligations. No matter the relationship you have established with certain members you have to be sure that they are meeting their responsibilities and that you are staying on top of them.</p>
	<p>Share financial records with the members.</p> <p>In addition to budget transparency you should announce the organization accounts receivables on a month or even a weekly basis. How much money is owed to the organization?</p>
	<p>Delegate anything you can.</p> <p>The CFO's position is probably the most straight forward. However, it requires the most paperwork. Have someone help you update payment records or deposit money in the bank.</p>
	<p>Continually evaluate your budget.</p> <p>Some situation may arise that cause changes in the original budget. Be sure to adjust line items appropriate to maintain the balance between expenditures and income. Do not overspend.</p>
	<p>If you have any questions get help.</p> <p>Your advisor, a financial advisor, alumni advisor, national organization- all of these people should be able to help.</p>



Session 9

Saturday, January 19th | 2:30 - 3:00 p.m.

2:30	Effective Communication <i>Doyle, A. (n.d.). These Are the Communication Skills Employers Look For In Employees. Retrieved October 25, 2017, from https://www.thebalance.com/communication-skills-list-2063779.</i>
	Communication may not be one of the first skill sets that comes to mind when you think of treasurer. You may think of organization, good with numbers, etc. But effective communication is extremely important in order to be a successful CFO.
	<ul style="list-style-type: none"> What will be some of the items you will need to communicate as CFO? Why will being an effective communicator be so important in your role? What does effective communication look like to you?
	One of the most difficult day-to-day responsibilities of leadership is ensuring effective communication. But sometimes, in our busy world, we sometimes forget just how important effective communication is to our success, our relationships and ultimately the happiness of our members. But, indeed, communication does play a major role in achieving our goals.
WB PG 15	<p>While there are probably several ways for you to be an effective communicator we have listed the top 10 in your workbooks.</p> <ol style="list-style-type: none"> 1. Listening 2. Nonverbal Communication 3. Clarity and Concision 4. Friendliness 5. Confidence 6. Empathy 7. Open-Mindedness 8. Respect 9. Feedback 10. Picking the Right Medium
	After “Listening” You can just briefly go through each aspect and ask participants how they feel that would play out in their role.
	Listening Being a good listener is one of the best ways to be a good communicator. No one likes communicating with someone who only cares about putting in their two cents, and does not take the time to listen to the other person. If you’re not a good listener, it’s going to be hard to comprehend what you’re being asked to do.
	Take the time to practice active listening. Active listening involves paying close attention to what the other person is saying, asking clarifying questions, and rephrasing what the person says to ensure understanding (“So, what you’re saying is...”). Through active listening, you can better understand what the other person is trying to say, and can respond appropriately

	<p>Nonverbal Communication Your body language, eye contact, hand gestures, and tone all color the message you are trying to convey. A relaxed, open stance (arms open, legs relaxed), and a friendly tone will make you appear more approachable, and will encourage others to speak opening with you.</p> <p>Eye contact is also important; you want to look the person in the eye to demonstrate that you are focused on the person and the conversation (however, be sure not to stare at the person, which can make him or her uncomfortable).</p>
	<p>Also pay attention to other people's nonverbal signals while you are talking. Often, nonverbal signals convey how a person is really feeling. For example, if the person is not looking you in the eye, he or she might be uncomfortable or hiding the truth.</p>
	<p>Clarity & Concision Good communication means saying just enough- don't say too little or talk too much. Try to convey your message in as few words as possible. Say what you want clearly and directly, whether you're speaking to someone in person, or on the phone, or via email. If you ramble on, your listener will either tune you out or will be unsure of exactly what you want. Think about what you want to say before you say it; this will help you to avoid talking excessively and/or confusing your audience.</p>
	<p>Friendliness Through a friendly tone, a personal question, or simply a smile, you will encourage your coworkers to engage in open and honest communication with you. It's important to be nice and polite in all your workplace communications. This is important in both face-to-face and written communication. When you can, personalize your emails to coworkers and/or employees – a quick "I hope you all had a good weekend" at the start of an email can personalize a message and make the recipient feel more appreciated.</p>
	<p>Confidence It is important to be confident in all of your interactions with others. Confidence ensures your members that you believe in and will follow through with what you are saying. Exuding confidence can be as simple as making eye contact or using a firm but friendly tone (avoid making statements sound like questions). Of course, be careful not to sound arrogant or aggressive. Be sure you are always listening to and empathizing with the other person.</p>
	<p>Empathy Even when you disagree with an employer, coworker, or member, it is important for you to understand and respect their point of view. Using phrases as simple as "I understand where you are coming from" demonstrate that you have been listening to the other person and respect their opinions.</p>
	<p>Open-Mindedness A good communicator should enter any conversation with a flexible, open mind. Be open to listening to and understanding the other person's point of view, rather than simply getting your message across. By being willing to enter into a dialogue, even with people with whom you disagree, you will be able to have more honest, productive conversations.</p>

	<p>Respect People will be more open to communicating with you if you convey respect for them and their ideas. Simple actions like using a person's name, making eye contact, and actively listening when a person speaks will make the person feel appreciated. On the phone, avoid distractions and stay focused on the conversation.</p>
	<p>Convey respect through email by taking the time to edit your message. If you send a sloppily written, confusing email, the recipient will think you do not respect them enough to think through your communication with them.</p>
	<p>Feedback Being able to appropriately give and receive feedback is an important communication skill. Managers and supervisors should continuously look for ways to provide employees with constructive feedback, be it through email, phone calls, or weekly status updates. Giving feedback involves giving praise as well - something as simple as saying "good job" or "thanks for taking care of that" to an employee can greatly increase motivation.</p>
	<p>Similarly, you should be able to accept, and even encourage, feedback from others. Listen to the feedback you are given, ask clarifying questions if you are unsure of the issue, and make efforts to implement the feedback.</p>
	<p>Pick the Right Medium An important communication skill is to simply know what form of communication to use. For example, some serious conversations (layoffs, changes in salary, etc.) are almost always best done in person.</p> <p>You should also think about the person with whom you wish to speak - if they are very busy people (such as your boss, perhaps), you might want to convey your message through email. People will appreciate your thoughtful means of communication, and will be more likely to respond positively to you.</p>
	<p>The cell phone is a wonderful tool, but it has taken the place of real human interaction. It is crippling an entire generation's ability to communicate. Instant communication does not necessarily make things clearer and can lead to misunderstandings that can fester and cause conflict within an organization.</p>
	<p>Conversations give members the opportunity to ask questions and voice their concerns. It also shows them that you genuinely care about their opinions.</p> <p>Conversations give you the opportunity to explain the vision completely, leaving nothing open to interpretation.</p>
	<p>Be sure to encourage your membership in real conversations and encourage others to do that same. You will find that this will improve your organization.</p>



Session 10

Saturday, January 19th | 3:00 - 3:30 p.m.

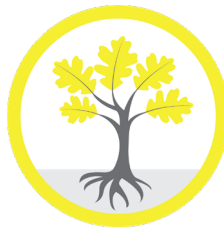
3:00 - 3:20 p.m.	Part of it's Prioritizing
	<p>Probably one of the most important and most difficult skill sets that you will need to have is being able to prioritize.</p> <p>This will be the responsibility of the entire leadership team but will be up to you to keep them on track financially.</p>
	<p>All projects – especially large, complex projects- need clear priorities. Easier said than done. You can count on technical projects, no matter how well-planned, to involve change orders, re-prioritization and the regular appearance of surprises. It's the natural order of things. The same can be said about an organization. But still- know the how to prioritize affects the success of your organization, the engagement of your team, and your role as a leader.</p>
WB PG 17	<p>Your organization probably has a lot of moving parts, all of which require money. Here are 5 steps to help in prioritizing:</p>
	<ol style="list-style-type: none"> 1. Collect a list of all of your tasks. Pull together everything you could possibly consider getting done over the year. Don't worry about the order, or the number of items up front. 2. Identify urgent vs. important. The next step is to see if you have any tasks that need immediate attention. We're talking about work, programs, projects, or fees that, if not completed or paid by a certain date will have serious negative consequences. Check to see if there are any high-priority dependencies that rely on you finishing up a piece of work now. 3. Assess value. Similarly, to what we talked about earlier, Look at your important work, programs, projects and identify what carries the highest value to your organization. As a general practice, you want to recognize exactly which types of tasks have top priority over the others. 4. Be flexible and adaptable. Uncertainty and change is a given. Know that your priorities will change, and often when you least expect them to. But- and here's the trick – you also want to stay focused on the tasks you're committed to completing. 5. Know when to cut. You probably won't be able to dedicate funding to everything. After you prioritize everything and look at your estimates, cut the remaining items from your list.
3:20 - 3:30 p.m.	Part of it's Prioritizing
	<p>Earlier in our time together we spent some time identifying the values or focus areas of our organization. Now we want you to spend the next 10 minutes and prioritize those areas for the upcoming year.</p>



Session 11

Saturday, January 19th | 3:30 - 3:45 p.m.

3:30 - 3:45 p.m.	Adaptability: The Most Valued Leadership Skill
	Clearly, there is a multitude of qualities that are important to practice as the CFO, but adaptability may top the list.
	<p>You may have all of your goals set, your priorities in order, and counted your expenses to the nearest penny but sometimes, things just happen. Maybe you don't get the membership that you were anticipating or maybe you get hit with a big fine. Maybe a fundraising event doesn't go as planned, or maybe the hall you usually book for event doubles in price. Sometimes there are things that you just can't account for.</p> <p>It is your job to be adaptable and to not give up. There are ways around the unpredictable.</p>
	So how does one do it? Learning an adaptable mindset does not come naturally to everyone, but there are methods to increase adaptability that any leader can use and be effective.
WB PG 18	<ul style="list-style-type: none"> • Think outside the box- Once in a while, you have to shake things up. If you're not innovating at all and simply following standards operating procedure, eventually those procedures can become outdated and ineffective. • Be an early adopter- Being among the first to embrace change can result in the discovery of a helpful technology, system, tool, process or software that can be a game change for your organization. It can also help make the process of change itself less jarring. • Don't just say no- Bring open minded and positive about initiatives will help facilitate one. Planning ahead to take advantage of downtime and pursue long-term objectives improves adaptability. • It all begins in the morning- Adhering to a morning routine often causes us to create routines and patterns through the rest of our day. Sometimes, it is important to shake things up in the morning, just to keep that mindset going for the rest of the day.
	While you can never exactly account for what may come up at the 12th hour it may not hurt to have back up plans in place. Or maybe even create a "Plan B Budget".



Session 12

Saturday, January 19th | 3:45 - 4:45 p.m.

3:45 - 4:00 p.m.	The Right Way to Hold People Accountable
	<ul style="list-style-type: none"> How many of your organizations have issues with members fulfilling their financial responsibilities? How do you hold them accountable? Do any of you have difficulty doing that?
	Sometimes when we think of accountability we think it means taking the blame when something goes wrong. Accountability isn't a confession. It is about delivering on a commitment. It's a responsibility to an outcome.
WB PG 19	So what can we do to foster accountability in the people around us? We need to aim for clarity in five areas.
	<p>1. Clear expectations. The first step is to be crystal clear about what you expect. This means being clear about the outcome you're looking for, how you'll measure success, and how people should go about achieving the objective.</p> <p>This isn't too difficult in your role. You let your members know what their financial obligation is and when it is due. Make sure that your messaging is consistent and that you are giving them enough notification. Make sure that it is clear from the start of their membership.</p>
	<p>2. Clear measurement. Should you agree on a payment plan with your members there needs to be clear targets and deadlines that is agreed upon. Should the member fail to meet their first payment it must be addressed immediately. Brainstorm a solution, identify a fix, or respond in some other way that gets the person back on track.</p>
	<p>3. Clear feedback. Honest, open, ongoing feedback is critical. We talked about budget transparency. You should be having open and honest conversations with the entire organization about the culture of your financial obligations. Are members taking this responsibility seriously? How are you doing on meeting deadlines?</p>
	<p>4. Clear consequences. If you have been clear in all of the above ways, you can be reasonably sure that you did what's necessary to support their performance. At this point, you have three choices: repeat, reward, or release.</p>
	We would recommend that you have consequences clearly defined in your bylaws so that should the situation come up you have backup. It is important though, that should you need to, you use these measures.

4:00 - 4:45 p.m.	Effective Confrontation
WB PG 20	Part of accountability comes confrontation. This can be a difficult, and not-so-glamorous part of the job. When a member doesn't pay their dues you may have to have the tough conversation with them. In your workbook are some tips to effective confrontation.
	<ol style="list-style-type: none"> 1. Give the benefit of the doubt Before you jump to conclusions, start with the assumption that others may have acted with the best of intentions – and that you might not know the whole story. 2. Resist the Urge to Email Very few people enjoy confrontation, and most of us do what we can to avoid it – including hiding behind the safe shield of email. Unfortunately, this only aggravates the problem. No matter how much you dislike confrontation watch carefully what you say over email. It is easy for those typed words to get interpreted a million different ways. 3. Sit Down and Talk Even if the issue is deeper than just a simple misunderstanding, talking is just about always the best place to start. Find a time to sit down privately. 4. Write it Down Sometimes we get nervous during the confrontation so write down your thoughts so that you can do into the conversation organized and thoughtful 5. Pick Your Battles Finally, keep in mind that you don't have confront everyone, every time-making an issue out of every little think will only create unnecessary tension. 6. Always use the Feel-Felt-Found Method <p>Feel- Acknowledge that you understand how a person feels – This creates empathy and immediately de-escalates a situation by acknowledging the concerns of the other person.</p> <p>Felt- Share a quick example of someone else who has experienced a similar situation or felt a similar way. This reduces isolation and takes the issue from being purely subjective to more objective.</p> <p>Found- Share how a person who felt something similar found the situation to have a positive outcome.</p>
	The important thing when confronting a member is that you have an adult conversation, get the root of the issue, come to a solution, and follow up.
	<p><i>For the remaining time have volunteers come up and practice effective confrontation using actual issues they may run into as treasurers. Invite other volunteers to pose situations that they know have occurred within their organizations.</i></p> <p><i>It's okay if you run over because you are going right into a Parking Lot session following this activity</i></p>



Session 13

Saturday, January 19th | 4:45 - 5:00 p.m.

4:45 - 5:00 p.m.	Parking Lot & Questions
	<i>Use this session to answer any questions or cover any information that you feel is beneficial that won't be covered in upcoming content.</i>



Session 14

Saturday, January 19th | 7:00 - 7:30 p.m.

7:00 - 7:30 p.m.	Introducing Bill Highway
	<i>At this time a member of staff will come to share Bill Highway documents and talk about this new opportunity for financial officers.</i>



Session 15

Saturday, January 19th | 7:30 - 8:30 p.m.

4:45 - 5:00 p.m.	National Fees, Deadlines & a National Overview
WB PG 25	<i>This time is designated for a National Representative to come and talk to CFO's about their financial responsibilities to the National Organization and deadlines. This is also a time to go over the finances of the National Organization for "budget transparency."</i>



Session 16

Saturday, January 19th | 8:30 - 9:30 p.m.

8:30 - 9:30 p.m.	Financial Education
	We want to switch gears a bit and talk about some potential financial themed educational programs that you can offer your members. These aren't programs that you specifically need to facilitate but we would encourage you to work with campus and community resources to schedule these programs.
	<i>Use this time to go through some of the resources in the workbook and to have a discussion around topics that they believe would be helpful to members.</i>
	<ul style="list-style-type: none"> • Paying off college debt • Buying your first house • Filing your taxes • Investing in stocks • Investing for Retirement • How to do More for Less • Establishing Credit
	Beyond your responsibility to create a budget and keep your organization fiscally healthy is to set your members up to be financially smart and healthy. The following programmatic topics may help.
	Tomorrow we will finish our time talking with our Fraternity partners who offer some incredible financial resources that your organizations may or may not be aware of and that you should be taking advantage of.
	We will also spend the remainder of our time participating in some round tables so that you can do some best practice sharing with other treasurer's.



Session 17

Saturday, January 19th | 9:30 - 10:00 p.m.

8:30 - 9:30 p.m. Budget Work	
WB PG 27	Before we dismiss you for the evening we wanted to allow you some time to work on developing your budget or making any improvements now that you have some tools and tricks.
	You are welcomed to use the budgets that you brought with you, or there are blank pages in your workbooks. We encourage you to work in a way that you will be most productive - if that is idea sharing with your brothers, then go for it. If that is plugging in some ear phones and working independently, then you, do you!



Session 18

Sunday, January 20th | 8:00 - 9:00 a.m.

8:00 - 9:00 a.m. Using Your Resources	
	Good morning! Welcome back. As we mentioned yesterday, we wanted to kick this morning off learning about the resources that are available to you through the fraternity.
	Finding the money to do everything that you want and need to do can be difficult, but there are several opportunities to help your organizations to find money to make things possible.
	<i>At this time a member from TBHC and TEF will come to talk about ways to utilize the scholarships and funding that is available for chapters.</i>
	<i>Should you end early, you can move on to the round table session or visit your Parking Lot list.</i>



Session 19

Sunday, January 20th | 9:00 - 10:00 a.m.

9:00 - 9:40 a.m.	Financial Round Tables
	We want to spend some time to break into round tables to discuss different topics that affect you as CFO.
	We will have two rounds of two topics each. Each round will be 20 minutes and you can choose what topics you participate in.
	<i>Facilitators can ask the group for topics to discuss. If you do not get any ideas, samples are listed below.</i>
	<ol style="list-style-type: none"> 1. Managing all of the request/goals from executive board members into a realistic budget. 2. How to navigate when your chapter wants to host a large social event when you don't have the money or feel that the money should be spent in different ways. 3. Communicating the raising of dues to new members. 4. A new event or program that your chapter planned and how you manage the financial implications.
9:040 - 10:00 a.m.	Wrap Up & Conclusion
	<i>Use any remaining time to answer questions, and wrap up your time together. Make sure to share resources and contact information so that you can help them when they begin their journey back to campus.</i>
	<i>Dismiss to brunch.</i>

