

## Instructions for Completing the 2021-2022 Budgeting Member Survey

Below are the instructions previously provided to vps: finance for conducting the member survey to begin the 2021-2022 academic year budget process.

1. **Member Survey Template:** [Access the 2021-2022 Member Survey Excel Template](#) relevant to your chapter in the library (one version is for campuses on a semester system and the other is for campuses on a quarter system).
2. **File Name:** Save the Excel file using this format: "R# Chapter Name School Name Date." Here is an example of this name format: R1 Alpha Chi Penn State 5Jan21.
  - a. Note: Please open and edit this template using Excel. Using Google Sheets or another online system will interfere with the spreadsheet formulas and logic that are used throughout the budget process.
3. **Member Roster:** Use [Anchorbase](#) to download an Excel file of your chapter roster. You can do this by selecting the "Roster" tab, clicking "Reports" and choosing the "New Member and Member Roster" option. Once you open that report, you will see an option to save the file to your device and have a number of options to choose from. Select "Excel" to begin the download process. Copy and paste the member number, last name, first name, email and cell number fields into the corresponding columns in the 2021-2022 Member Survey Excel Template.
4. **Member Responses:** Survey your members to understand their plans for the fall 2021 and spring 2022 semesters. We recommend conducting this survey through OmegaOne, Facebook poll, Google Form or other formalized method of data collection so you may refer back to the results down the line. You should pose two different poll questions: one for fall 2021 and one for spring 2022 as answers may be different for each member based on the term. We understand that plans may change based on the pandemic, early/delayed graduations for individual members, study abroad opportunities, etc. Please inform members that their response to this survey is not binding, nor does it serve as any form of rooming agreement or contract. These numbers may be changed as we get closer to the next academic year but will serve as a baseline at these early stages in the budget process. We will check in with you later in the spring semester for any additional updates. All member responses should fall into one of the five options listed in the pink boxes in the 2021-2022 Member Survey Excel Template:
  - a. Live in the house
  - b. Live outside the house
  - c. I will not be enrolled at University due to graduation, transferring or resigning
  - d. Seeking [Academic Professional Status](#), living away from campus or out of the house
  - e. Seeking Academic Professional Status, living in the house

*\*Note: If your chapter does not have a chapter facility, members only need to select from options b, c and d.*

5. **Input Responses to Template:** Input the responses you collect from chapter members into the “Fall Response” and “Spring Response” columns of the 2021-2022 Member Survey Excel Template. **Responses for all members must be listed exactly as they appear in the pink box**, so please double check your work after all data is entered. If this is done correctly, member counts will automatically be calculated in the Member Count Table. **All members listed on your roster must have a response listed prior to submission.**
6. **Save and Submit:** Attach your completed member survey document as an excel file and submit via email to Assistant Director of Collegiate Finance Lexie Maschoff at [lexie@deltagamma.org](mailto:lexie@deltagamma.org) and Director: Collegiate Budgeting Rachel Stack-Dunne Foster at [collegiatebudgeting@deltagamma.org](mailto:collegiatebudgeting@deltagamma.org).
  - a. If you are a September billing chapter, please include this information in the body of the email.