



# **Officer Training Seminar**

# **Staff & Volunteer Partnerships**



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# Introductions



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# Organizational Partnership

**What are the key characteristics necessary for a staff and volunteer partnership?**



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***“Paid staff and external volunteer talent, our knowledge philanthropists, work side-by-side as equal yet different contributors to the organization.”***

Annastasia Palubiski, Director, People Engagement, Vantage Point, Vancouver, BC, Canada



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# Defining Roles and Responsibilities

Volunteers- Ideas, Strategies, Knowledge

Staff- Implementers, Consistency of Operations



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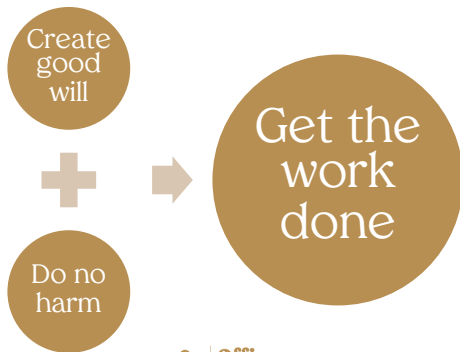
# Organizational Partnership

**What are some examples of how you and staff have worked together?**



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# Organizational Partnerships





# Getting the Work Done

- Create efficiency
- Extend grace, trust and respect
- Prepare for pitfalls
- Set healthy boundaries
- Define responsibilities
- Establish communication norms



# Create Good Will

**What is your vision for what this partnership should look like in the future?**



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# Define Responsibilities

- Up-to-date position descriptions that all on the team are made aware of
- Task descriptions for committees
- Clear description of expected results and time frames
- Single person responsible
- Action items at the end of every meeting
- Responsibility flow chart
- Inform and follow up



**“It’s crucial that volunteers and staff have a mutual respect for one another and see themselves as part of a team- working together for the benefit of the organization.”**




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**“This past year, with so many special projects related to our sesquicentennial, it was such a relief to have so many dedicated and caring volunteers devoting so much of their time to the important plans. Working with volunteers connects us to our membership on a deeper level, and that is always a good thing!”**



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**“Collaboration with passionate volunteers continues to make me feel invigorated in my role. Our volunteers are not only our colleagues but also our friends and we are so appreciative of their willingness to work alongside us.”**



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**“Simply stated, we could not do what we do without our volunteers. They are so many things all at once: time dedicated, knowledge imparted, and generosity personified. Our volunteers make doing good easier and more accessible for our collegians, alumnae, communities, and organizations that share our mission. Thank you will never be enough!”**



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# Volunteer Focus Groups

**By June 2026, Leadership and staff roles have been assessed and adjusted for maximum participation, productivity, efficiency, and fulfillment.**

- Thursday, July 13 at 5 p.m. PT | 8 p.m. ET
- Tuesday, July 25 at 8 a.m. PT | 11 a.m. ET
- Wednesday, July 26 at 11 a.m. PT | 2 p.m. ET
- Wednesday, August 9 at 6 p.m. PT | 9 p.m. ET



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**THANK YOU!**



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# **Officer Training Seminar**

# Top Five Finance Facts

Lexie Kiernan  
assistant director for leadership & learning



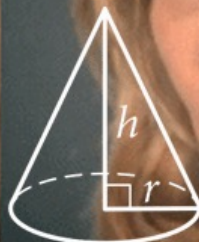
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$$A = \pi r^2$$

$$C = 2\pi r$$

$$V = \frac{1}{3} \pi r^2 h$$



$$V = \pi r^2 h$$

	30°	45°	60°
sin	$\frac{1}{2}$	$\frac{\sqrt{2}}{2}$	$\frac{\sqrt{3}}{2}$
cos	$\frac{\sqrt{3}}{2}$	$\frac{\sqrt{2}}{2}$	$\frac{1}{2}$
tan	$\frac{\sqrt{3}}{3}$	1	$\sqrt{3}$



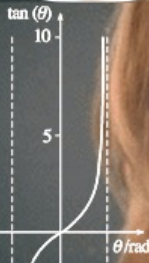
$$\int \sin x dx = -\cos x + C$$

$$\int \frac{dx}{\cos^2 x} = \tan x + C$$

$$\int \tan x dx = -\ln|\cos x| + C$$

$$\int \frac{dx}{\sin x} = \ln\left|\tan \frac{x}{2}\right| + C$$

$$\int \frac{dx}{\cos^2 x} = \tan x + C$$



$$ax^2 + bx + c = 0$$

$$a\left(x^2 + \frac{b}{a}x + \frac{c}{a}\right) = 0$$

# Top Five Finance Facts

1. Budgeting process
2. Funding sources
3. Concerns & collegiate chapters of note
4. Use of Venmo
5. Application to your role



# Budgeting Process



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# Budgeting Process

- **Fraternity**
  - 2-year business cycle, Biennium
  - Fraternity Constitution
- **Foundation**
  - Annual basis
  - Provides funds to fraternity programming via Gift Grant
- **Collegiate Chapters**
  - Annual basis
  - Driven by chapter size and programming needs
- **Alumnae Groups**
  - Annual basis
  - Driven by year of biennium





# Funding Sources



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# Tax Status

- **Fraternity: 501(c)(7)** (nonprofit social and recreational clubs, donations not tax deductible)
  - Collegiate chapters
  - Alumnae groups
- **Foundation: 501(c)(3)** (nonprofit status, donations are tax deductible)



# Fraternity Funded

Through income generated by collegiate members, alumnae dues, specific gifts, and unrelated business income.

## **Business Operating Expense Examples:**

- *2-year biennium budgeting:*
  - Marketing and branding
  - Volunteers, Leadership, and EO Staff
  - Executive Offices Building
  - Business events like Convention, OTS, etc.
- *Other*
  - Functional training initiatives (training fee)



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# Fraternity Set-Aside Funds

Leftover funds that Council votes to identify as retained assets for future spending. Non-taxable based on IRS guidelines.

**Non-fraternity business expenses. Educational and professional development purposes. Examples:**

- Anchor Academy
- Keynote speakers
- Leadership development initiatives



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# Foundation Funded Programs

Funds raised for training and programming initiatives through the Foundation Gift Grant and gifts.

## **Foundation Funded Program Examples:**

- Act with Intention series
- Lewis Institute
- CDC program
- Anchor Academy



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# Concerns & Collegiate Chapters of Note



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# Financial Concerns & Threats

- Declining enrollment on college campuses
- Declining recruitment numbers
- Declining interest in living in chapter facilities on some campuses
- Difference in expectations of what collegiate membership should cost



# Use of Venmo



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# Proper Venmo Use for Foundation Fundraising

- Venmo is **only** allowed through a member planet donation site or payment form.
- No business, chapter or personal Venmo accounts are allowed for
- [FoundationFinance@deltagamma.org](mailto:FoundationFinance@deltagamma.org)



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# Application to Your Role



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# What does this mean for you?

If you work with **house corporations...**

- How can the AA be reduced?

If you work with **alumnae...**

- How can Founders Day costs be reduced?

If you work with **fundraising events...**

- Do chapters need t-shirts for each event?

If you work with **programming...**

- Can events be held at less expensive venues?

If you work with **membership...**

- Are new decorations for each round of recruitment critical?

If you work with **chapter goal setting...**

- How does the budget embody chapter values and goals?







# **Officer Training Seminar**

# Mentoring & Coaching

Lauren Utley  
associate director for training & volunteer management



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Teaching	Mentoring	Coaching
Telling	Mix	Listening
This is what I need you to do .... specifically	One thing you need to consider	You have done this before, how did you do it?
Here are the goals and implementation specific to your CMT role	In my experience...	Now that you know the goals for your office, how do you see yourself implementing them?
Stop saying "shut-up"	I've used these techniques in the past	How do you think members feel when... What are creative ways to get their attention?
Next time you should	Next time consider doing this instead....	What do you think went well? What do you think could be done differently?
Here are the consequences of failure	Call this person for advice	What do you see as the possible outcomes and how will you manage the risk?
I need you to change the poster design	If you print the poster, I think that	What are your PR goals? How effective is the design in meeting them? What do you want to do?



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# FOUR TYPES OF TRUST



## COMPETENCE

THE PERSON HAS  
THE RIGHT skills  
TO solve your  
ISSUE. THEY'RE AN  
EXPERT OR AUTHORITY  
IN THEIR AREA.

## CARE



THEY CARE ABOUT  
YOUR WELL-BEING  
& WHAT'S BEST  
FOR you, NOT  
YOUR SUCCESS

## CHARACTER



PEOPLE WITH A  
STRONG MORAL  
COMPASS &  
UNCOMPROMISING  
VALUES.

## CONSISTENCY



RELIABLE, PRESENT,  
& AVAILABLE  
WHEN YOU NEED  
THEM.



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# Why is Feedback Important?



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**Questions?**