

## INSTRUCTIONS FOR CHAPTER TREASURERS - 2022-2023

See [www.deltakappagamma.org/IL/](http://www.deltakappagamma.org/IL/) - Instructions for Chapter Treasurers, Illinois State Forms, and Form 15 (Under EXECUTIVE, Treasurer)

Access [www.dkg.org](http://www.dkg.org) – all International Forms (18A, new member form, reinstatement, Change of Address), Resources, Supplies

### RESOURCES

- *Guidelines for Chapter Treasurers, Constitution, International Standing Rules, DKG Illinois State Bylaws/Standing Rules*

### ANNUAL REPORT OF CHAPTER TREASURER - Form 15 due July 15 to state treasurer

- The form will appear in a list in Chapter Connect during May. Form 15 is due to the state treasurer by July 15. The information on Form 15 from the chapters is used by the state treasurer to fill out Form 16, which is sent to International by the end of July.
- If the chapter awards grants to potential educators (even through a separate foundation maintained by the chapter), complete the Grant-in-Aid section; leave section blank if the chapter does not award grants.
- If the chapter has a scholarship fund to award scholarships to chapter members, complete the Chapter Scholarship section; leave section blank if the chapter does not have a scholarship fund.
- Please list the names of those Inducted, Transferred in, and Reinstated, on a separate sheet (probably a WORD file).
- Please list the names of those Transferred out, Resigned, Dropped for nonpayment of dues, and Deceased on the same separate sheet. Therefore, the state treasurer should receive from you the Form 15 and a separate file detailing membership additions and deletions.

### FILING FORM 990-N POSTCARD WITH IRS--July 1 but before November 15

- Refer to the User Guide directions found at [www.irs.gov/990n/](http://www.irs.gov/990n/)
- Log on to <https://sa.www4.irs.gov/epostcard/> to begin filing 990N. Use the Returning User section & the same User ID and password you used last year (or the previous treasurer used last year). File Form 990-N postcard for 2021 after June 30 but before November 15 using the same email address. It is best not to wait until the deadline!!
- IRS does NOT email an acceptance. Upon IRS notification of acceptance on the site mentioned above, forward IRS acceptance to state treasurer at [vlsteach@yahoo.com](mailto:vlsteach@yahoo.com) or print IRS acceptance and snail mail printed copy to Vicki Smith (preferably by November 1).

### FINANCIAL REVIEW/AUDIT OF TREASURER'S BOOKS - after June 30

- Treasurer's books must be submitted for an annual financial review/audit after June 30.
- Refer to DKG Illinois State Finance Committee's *Guidelines for Financial Review/Audit* [www.deltakappagamma.org/IL/](http://www.deltakappagamma.org/IL/).

### CHAPTER CONNECT DUES FORM - due July 1-Sept. 30 to state treasurer

- The treasurer receives notification that her Chapter Connect connection on the international website is ready for use. This should happen approximately April 1. To access, sign in with your ID number and password. Look for the MY DKG button in the upper right. Click on MY DKG. Look in center area of screen for Chapter Connect button.

- Collect dues from April 1 through June 30 for the upcoming fiscal year. Record on paper and on Chapter Connect (submitting when most or all members have paid). I strongly recommend updating a members status change along with contact information changes in Chapter Connect before creating any dues order forms. Otherwise, if a member's status has changed from Active to Reserve, for example, the correct dues amount will appear.
- Involve the Membership Committee in assisting with retaining all members and reinstating former members.
- Send dues notice and/or call/contact members not paid by June 15. Ideally dues should be paid by June 30. However, members are not officially dropped for nonpayment of dues until after September 30<sup>th</sup>.
- July 1: Complete Chapter Connect for your chapter (double checking all the members who have paid and that they have the proper status which can be edited) and Form 18A for members who have indicated they are to be dropped.
- According to instructions on website, electronically submit state dues as calculated by Chapter Connect report to the state treasurer with check payable to **DKG Illinois State Organization** for the correct amount of dues and fees postmarked by July 10 but no later than September 30. For the International portion of the dues, send a check payable to **DKG Society International** to the address stated on the dues order form.
- Chapter Connect will automatically figure the amounts to send to state and International. The amounts the chapter treasurer should send to the state treasurer are as follows:
 

Active members	\$23.00
Reserve members	8.00
Scholarship Fee for each active & reserve member	1.00 or \$.20*
Induction fee for each new member	2.50
Honorary Induction (one-time) fee	49.50
Reinstatement fee	none
<i>NEWSCASTER</i> Fee only for <u>Active Life</u> & <u>Honorary</u>	2.50

\*If the chapter maintains its own scholarship fund for scholarships for its members, send \$.20 per member.
- If dues are paid late (after Sept. 30<sup>th</sup>), use Chapter Connect to electronically submit dues to state treasurer and International Membership Department along with a reinstatement form. Send checks for each portion to the state treasurer and the DKG Membership Department.

## **DKG ILSO FEE FORM**

### **STATE CONVENTION FEE & LEADERSHIP DEVELOPMENT FEE - DKG Fee Form -** *due September 30 to state treasurer*

- The State Convention Fee helps with state convention expenses. The chapter pays \$1 per member based on the June 30 chapter membership.
- The \$30 annual Leadership Development Fee helps with Training for Chapter Leaders and Transition Meeting expenses.

**INDUCTION FEE:** The induction fee for new members that is sent to state is \$2.50 per member. If a new member joins between March and June 30, the fee must be paid in the new fiscal year.

### **SCHOLARSHIP FEE** - *due September 30 to state treasurer*

- Each Active and Reserve member pays a \$1.00 Scholarship Fee. Record fee on DKG FEE FORM and send fee with other fees to the state treasurer. If the chapter maintains its own scholarship fund for scholarships for its chapter members, send \$.20 for each active and reserve member instead of the \$1.00 fee. This fee applies to each new member who joins between July 1<sup>st</sup> and the end of December, as well.

### **NEWSCASTER FEE** - *due September 30 to state treasurer*

- The \$2.50 is due for each Active Life and Chapter Honorary member, NOT for each member of the chapter, to help defray a portion of the newsletter costs. Record the amount on the DKG FEE FORM and submit with the other fees to the state treasurer.

### **NEW MEMBER FORM - Form 81** [www.dkg.org](http://www.dkg.org) under Forms, Membership

- Each member completes new member form and pays a \$10 new member fee (chapter retains \$7.50). NOTICE: Form now says Date Joined rather than Date Inducted. The new member becomes a member when she pays her dues. **This form is for the chapter and state ONLY; international will trust that the chapter treasurer will enter the information accurately into Chapter Connect.**
- For inductions between April 1-December 31, collect dues, scholarship fee, and new member fee. A new member becomes a member when she pays her dues. Following payment of dues and fees, complete Form 81 new member form, Chapter Connect Dues Form and a DKG Fee Form; send Form 81 and Chapter Connect Dues Form electronically to state treasurer and Membership Department at International Headquarters. Send check for the state portion of dues and fees (payable to DKG Illinois State) to the state treasurer. In addition, send a check payable to DKG Society International for the international portion of the dues (no fees) as calculated by Chapter Connect report system.
- For inductions held after January 1 through April 1, **collect half the international (\$20) and state dues (\$11.50)** and the induction fee; no scholarship fee is collected. Send new member forms electronically to the state treasurer and enter the new member in the Chapter Connect portal. Send Chapter Connect Dues Form, a check payable to DKG Society International for half the International dues (\$20 per new active member, \$10 for each new collegiate member) to the International membership department. Send the state dues and \$2.50 for each new member to state treasurer following induction.

### **CHANGE OF ADDRESS**

- Any Chapter Treasurer can sign into her own International website area, choose MY DKG button, locate Chapter Connect, and edit names, addresses, and email addresses on her chapter roster. Any member can go into her own profile and change name and address or email or phone to keep it up to date. It is appreciated that this same information be sent to the state treasurer to be sure she gets this important information, too. The editor should also be notified of address and email changes so members receive all the necessary communications.

### **DEATH OF MEMBER - Form 18A, Form 6** [www.dkg.org](http://www.dkg.org) under Forms, **Membership**

- Complete Form 18A with date of death and send to the state treasurer and to International Membership Dept ([mem@dkg.org](mailto:mem@dkg.org)) electronically. Remind the person responsible for send-

ing Form 6 Death of Member Report to complete/send electronically ASAP to the state membership chair and to the state treasurer.

**TRANSFER OF MEMBER REQUEST--Form TR-A [www.dkg.org](http://www.dkg.org) under Forms, Membership**

- A member in good standing may transfer from one chapter to another upon notifying Society Headquarters using Form TR-A. Society Headquarters sends an Official Notice of Transfer to the transferring member, to the presidents and treasurers of the sending and the receiving chapters, and to the state organization treasurers. The receiving chapter does not vote on the transfer.

**REPORT OF DROPPED MEMBERS--Form 18A [www.dkg.org](http://www.dkg.org) under Forms, Treasurer**

- On Form 18A all reasons for dropping (except death) are considered resignations. For nonpayment of dues, use (5) Economic reason for resignation. The other reasons are: (1) Meeting Places/Times inconvenient; (2) Other responsibilities (family, work, etc.); (3) Chapter Not Meeting Needs; (4) Health; (6) Transportation (use for reserve members, especially if they live out of town); (7) Moved from Area; (8) Death.

**REINSTATED MEMBER FORM--Form 83 [www.dkg.org](http://www.dkg.org) under Forms, Membership**

- Reinstatement MEANS added back into your membership rolls after having been off those rolls over a year. If someone pays after September 30 and has been dropped by the International Membership Department, that person needs to be reinstated as well. Contact the International Membership Department at 512-478-5748 and ask them to reinstate that member so you can process her dues on Chapter Connect.
- A former member shall be reinstated to membership by the chapter receiving the request. There are no restrictions, chapter or geographical, on reinstatement. The chapter does not vote on the reinstatement; there is no reinstatement fee.
- If reinstated on or after April 1 and before March 15, dues and the scholarship fee shall be paid at the time of reinstatement. Complete Reinstated Member Form 83 and Chapter Connect Dues Form (with Member ID if possible). Send Form 83 with state portion of dues to the state treasurer shortly after former member is reinstated. In addition, send a check for the International portion of the dues (payable to DKG Society International) to the state treasurer to process. They do not need a copy of Form 83.

**CONTRIBUTIONS**

▪ **State Funds with Illinois Contribution Form 43 [www.deltakappagamma.org/IL/](http://www.deltakappagamma.org/IL/)**

Grant-in-Aid, Scholarship, Women in the Arts, Lambda State Foundation for Educational Studies

Complete Illinois Contributions Form 43, one form per fund, one check per fund as these funds are in separate bank accounts, and send to the state treasurer. Make checks payable to **DKG, Illinois State Organization**; indicate the fund name in the MEMO section of the check. Checks and forms may be mailed in one envelope to the state treasurer. If your chapter wishes to have the contributions seen on the Chapter Contributions list at Convention, be sure to have all contributions to the state treasurer by the end of February.

▪ **International Funds with Society Contribution Form 43 [www.dkg.org](http://www.dkg.org) under Forms, Contribution**

Educators Book Award Fund, Emergency Fund, Golden Gift Fund, Scholarship Fund, International Speakers Fund, World Fellowship Fund, DKG Educational Foundation

Complete Society Contribution Form 43. A separate contribution form is required for each fund. Check(s) should be made out directly to the respective fund(s). Send check(s) and form(s) to Society Headquarters (**not to the state treasurer**).

#### **CHAPTER BUDGET, GUIDELINES FOR CHAPTER BUDGET -**

[www.deltakappagamma.org/IL/](http://www.deltakappagamma.org/IL/)

- The chapter treasurer should serve on the Finance Committee. Follow *Guidelines for Chapter Budget* and *Chapter Budget Form*.
- Presentation of budget by chapter Finance Chair and voting on budget should be in accordance with chapter rules.

#### **ORDER or DOWNLOAD SUPPLIES - [www.dkg.org](http://www.dkg.org)**

- Supplies may only be ordered online. Go to [www.dkg.org](http://www.dkg.org); click on DKG Store to view Product Categories: Branded Products, Membership Supplies, Brochures, Program Materials, Award Concepts (Society jewelry/paraphernalia), Forms, Publications; information includes item picture/name, packaging, price, shipping & handling.
- Forms and resources may also be downloaded.

#### **Download Forms & Resources from International Website [www.dkg.org](http://www.dkg.org)**

- Website Sign In - Username: Member ID#; Password: dkg2014society
- Member may request change of password under My DKG button.
- For assistance, email [mem@dkg.org](mailto:mem@dkg.org) or call 512-478-5748.

#### **Forms Available on International Website**

**Award Concepts Order** under Forms, Award Concepts Order  
Order Forms for Society Jewelry/Paraphernalia

#### **Contribution**

Form 43 Society Contribution Form  
Schools for Africa Brochure - Contribution Form

#### **Treasurer**

Dues Form Report of Dues and Fees from Chapter Connect  
Form 18A Report of Dropped Members  
Form 87 Change of Treasurer Form  
Form 123 Dues Reminder Single  
Form 123 Dues Reminder Per Page  
Form 6 Death of a Member is found under Membership

#### **Download Forms & Resources from DKG Illinois State Website [www.deltakappagamma.org/IL/](http://www.deltakappagamma.org/IL/) (UNDER EXECUTIVE, Treasurer)**

Instructions for Chapter Treasurers, Letter to Chapter Treasurers  
Form 15 Annual Report of Chapter Treasurer or in Chapter Connect  
Foundation Contribution Form for Individuals  
DKG Fee Form  
Illinois Contribution Form 43 and Sample Voucher for Chapter Use