

INSTRUCTIONS FOR CHAPTER TREASURERS – 2017-2018

www.deltakappagamma.org/IL/ - Instructions for Chapter Treasurers, Lambda State Forms, and Form 15

www.dkg.org – all International Forms, Resources, Supplies

RESOURCES

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

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

- The chapter treasurer receives Form 15 in May. If Form 15 has not arrived by June 10, contact State Treasurer Sharon-Vinson. Form 15 is due to the state treasurer by July 15.
- If the chapter awards grants to potential educators (even through a separate foundation maintained by the chapter), complete the Grants-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 Initiated, Transferred in, and Reinstated, on the second page of Form 15.
- Please list the names of those Transferred out, Resigned, Dropped for nonpayment of dues, and Deceased on the second page if room allows; otherwise, use a separate sheet.

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/
- 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 2016 after June 30 but before November 15 using the same email address.
- Upon IRS email notification of acceptance, forward IRS email to Sharon Vinson or print IRS email and snail mail printed copy to Sharon Vinson (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 Lambda State Finance Committee's *Guidelines for Financial Review/Audit* www.deltakappagamma.org/IL/.

DUES - FORM 18 - due Nov. 10 to state treasurer

- The treasurer receives Form 18 and membership cards from International about August 10.
- Collect dues from July 1 through October 31. Issue Membership Card upon payment of dues.
- 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 October 15. Dues should be paid by October 31.
- November 1: Complete Form 18 and Form 18A. List amount of money (not check marks) in the columns on Form 18.

- Send Form 18 (3 copies) to the state treasurer with check payable to Lambda State DKG for correct amount of dues and fees postmarked by November 10. Summarize entire report on Page 1, lower left corner only (Do not put totals at the bottom of any other page.).
- The amounts the chapter treasurer should send to the state treasurer are as follows:

Active members	\$63.00
Reserve members	28.00
Scholarship Fee for each active & reserve member	1.00 or \$.40*
Initiation fee for each new initiate	5.00
Honorary Initiation (one-time) fee	49.50
Reinstatement fee	none
NEWSCASTER Fee for Active Life & Honorary	2.50

*If the chapter maintains its own scholarship fund for scholarships for its members, send \$.40 per member.
- If dues are paid late, submit dues to state treasurer on Form 18 (not as a reinstatement).

SCHOLARSHIP FEE - due Nov. 10 to state treasurer

- Each Active and Reserve member pays a \$1.00 Scholarship Fee. Send fee with dues on Form 18; mark amount of fee in the Scholarship column. If the chapter maintains its own scholarship fund for scholarships for its chapter members, send \$.40 for each active and reserve member instead of the \$1.00 fee

NEWSCASTER FEE - due Nov. 10 to state treasurer

- The \$2.50 is paid annually by November 10 on Form 18 for Active Life and Chapter Honorary members. Use the blank column on Form 18 and label it *Newscaster*.

STATE CONVENTION FEE & LEADERSHIP DEVELOPMENT FEE - DKG Fee Form - due Nov. 15 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 (verify June 30 membership). Send check for State Convention Fee and DKG Fee Form by November 15 to the state treasurer.
- The \$30 annual Leadership Development Fee helps with Training for Chapter Leaders and Transition Meeting expenses. Send the \$30 Leadership Development Fee and DKG Fee Form by November 15 to the state treasurer.

INITIATE CARD FORM/CARD - Form 81 www.dkg.org

- Each initiate completes initiate card form (card) and pays a \$10 initiation fee (chapter retains \$5). The chapter treasurer signs the form/card.
- For initiations held July 1-March 31, collect dues, scholarship fee, and initiation fee. Following initiation, complete Form 81 initiate form (card) and Form 18; send Form 81, Form 18, and a check for dues and fees to the state treasurer.
- For initiations held after April 1 and before July 1, collect only the initiation fee; no dues or scholarship fee is collected. Send initiate card(s), Form 18, and check for \$5 for each initiate to state treasurer following initiation.

CHANGE OF ADDRESS FORM - Form 27 www.dkg.org

- Send change of address form electronically or by mail to the state treasurer to ensure a current database for state/International mailings.

DEATH OF MEMBER - Form 18A, Form 6 www.dkg.org

- Complete Form 18A with date of death and send to the state treasurer; remind the person responsible for sending Form 6 Death of Member Report to complete/send ASAP.

TRANSFER OF MEMBER REQUEST--Form TR-A www.dkg.org

- 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

- On Form 18A all reasons for dropping (except death) are considered resignations. For non-payment 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

- 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 July 1 and before April 1, dues and the scholarship fee shall be paid at the time of reinstatement. Complete Reinstated Member Form 83 and Form 18 (with Member ID if possible). Send Forms 83 and 18 with dues and scholarship fee to the state treasurer shortly after former member is reinstated.
- If reinstated on or after April 1 and before July 1, no dues or scholarship fee is required. Complete 83 and Form 18 and send to the state treasurer.

CONTRIBUTIONS

- **Lambda State Funds with Illinois Contribution Form 43 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, and send to the state treasurer. Make checks payable to Lambda State, DKG; indicate the fund name in the MEMO section of the check. Checks and forms may be mailed in one envelope to the state treasurer.

- **International Funds with Society Contribution Form 43 www.dkg.org**
Educators Award Fund, Emergency Fund, Golden Gift Fund, Scholarship Fund, International Speakers Fund, World Fellowship Fund, 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/

- 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

- Supplies may only be ordered online. Go to 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

- [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**Award Concepts Order**

Order Forms for Society Jewelry/Paraphernalia

Contribution

Form 43 Society Contribution Form

Society Contribution Web form

Schools for Africa Brochure - Contribution Form

Treasurer

Form 18 Report of Dues and Fees

Form 18A Report of Dropped Members

Form 87 Change of Treasurer Form

Form 123 Dues Reminder Single

Form 123 Dues Reminder Per Page

Download Forms & Resources from Lambda State Website www.deltakappa-gamma.org/IL/

Instructions for Chapter Treasurers, Letter to Chapter Treasurers

Form 15 Annual Report of Chapter Treasurer

Foundation Contribution Form for Individuals

DKG Fee Form

Illinois Contribution Form 43

Sample Voucher for Chapter Use