



# GUIDELINES FOR CHAPTER LEADERS

**A guide for chapter presidents,  
treasurers, and membership chairs**

The Delta Kappa Gamma Society International  
Revised May 2019  
[www.dkg.org](http://www.dkg.org)

## MISSION STATEMENT

*The Delta Kappa Gamma Society International promotes professional and personal growth of women educators and excellence in education.*

## VISION STATEMENT

*Leading Women Educators Impacting Education Worldwide*

## INTERNATIONAL PROJECTS

U.S. Fund for UNICEF's Schools for Africa

[www.unicefusa.org/dkg](http://www.unicefusa.org/dkg)

Support for Early-career Educators

## PURPOSES

1. To unite women educators of the world in a genuine spiritual fellowship
2. To honor women who have given or who evidence a potential for distinctive service in any field of education
3. To advance the professional interest and position of women in education
4. To initiate, endorse and support desirable legislation or other suitable endeavors in the interests of education and of women educators
5. To endow scholarships to aid outstanding women educators in pursuing graduate study and to grant fellowships to non-member women educators
6. To stimulate the personal and professional growth of members and to encourage their participation in appropriate programs of action
7. To inform the members of current economic, social, political and educational issues so that they may participate effectively in a world society

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## Preface

Thank you for your commitment to serve the Society at the chapter, state organization and international level in this significant, challenging and important role. The chapter president's leadership in inviting and responding to new ideas, building a leadership team and launching significant projects involving chapter members sets the pace for a successful biennium.

This guidebook has been compiled to aid each chapter president, treasurer and membership chair in her leadership position. Every effort has been made to provide information in a convenient form. It does not replace the *Constitution* or *International Standing Rules* but serves as a helpful tool to bring together in one publication information pertaining to the chapter leadership position.

You can look for support from your state organization president and other state organization personnel. Information also may be obtained by visiting the Society website at [www.dkg.org](http://www.dkg.org) or by contacting Society Headquarters.

Email:

- the executive director and/or the international president at [societyexec@dkg.org](mailto:societyexec@dkg.org);
- the membership director at [mem@dkg.org](mailto:mem@dkg.org);
- or the business director at [societyoper@dkg.org](mailto:societyoper@dkg.org)

DKG Website:

- under the Contact Us tab, click on an email button to send a message
- click on the chat button to initiate a chat with a Headquarters staff member



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## Eight Chapter Constitutional Mandates

1. Members are elected to membership based on particular qualifications. (III.B.1)
2. Members complete financial responsibilities. (IV.C.1)
3. Chapters must have Rules that are consistent with the *Constitution* and its state organization bylaws. (V.B.3)
4. Chapters must elect and appoint particular officers who must be members. Chapter officers are elected in even-numbered years. (VI.A.3 and D.3)
5. Chapters must have an Executive Board, with defined duties, that meets at least twice a year. (VII.C and IX A.2)
6. Chapters adhere to the Purposes and Mission Statement. They are responsible for Society duties and may create committees to complete that work. (VIII.A.2b)
7. Chapters must submit annual and biennial reports. (VIII.A.2b)
8. Chapters must have at least four (4) regular meetings per year. (IX.A.1.a)

## Governing Documents

The basic governing document of The Delta Kappa Gamma Society International is the *Constitution*. The international organization is governed by the *Constitution*. The international organization, state organizations, and chapters are governed by the *Constitution* and the *International Standing Rules*.

State organization bylaws and standing rules, which must be consistent with the *Constitution*, provide additional guidance within each state organization. Each chapter is governed by the *Constitution* and the *International Standing Rules*, state organization bylaws and standing rules, and chapter rules.

## Boards

The Delta Kappa Gamma Society International members govern themselves through the international *Constitution* and *International Standing Rules*, state organization bylaws and standing rules, and chapter rules. These documents are adopted by members in attendance at international conventions, state organization conventions, and chapter meetings. Elected, employed, and appointed officials meet as boards to act for and represent the membership and to see that the adopted rules are followed.

# Duties of Chapter Presidents

The following list reflects the responsibilities outlined in the *Constitution* and *International Standing Rules* (Article VI) as well as general practice.

## Responsibilities

- Act as presiding officer at regular and called meetings and direct the activities of her chapter
- Act as chair of the chapter executive board
- Serve as an ex-officio member with vote on the respective state organization executive board
- Appoint a parliamentarian
- Appoint standing and special committees
- Approve for payment all expense claims
- Approve publications
- Fill by appointment all vacancies in office
- Ensure chapter rules are up to date and in alignment with state organization bylaws and *International Constitution*
- Ensure the chapter has a plan for strategic growth and development
- Represent the chapter at meetings, conferences, and other events
- Take action, with the advice and approval of the executive board, on matters which cannot be deferred until the next meeting
- Check the file received from her predecessor, which should contain up-to-date materials
- Become familiar with president's duties, the procedures and work of the Society, and the business that the chapter has transacted previously by studying materials and by attending conferences, conventions, and workshops, including leadership development.
- Appoint and work through committees if committees are designated by chapter rules (see section on committee work)
- Order supplies for membership: the membership certificates and keypin order forms, at least six weeks before an induction. Consider ordering the New Member Info Kit for each inductee.
- Assure that recognition is given to any chapter member who is serving as a state organization or international officer, committee chair, or committee member
- Attend meetings and workshops of the state organization and, whenever possible, the international conference and the international convention
  - Note: It is suggested that the chapter pay all or part of the president's expenses to state organization meetings and, when possible, to international meetings because the president is the official representative of her chapter.*
- Participate (with the Finance Committee) in the processes of budget preparation and supervision of chapter finances
- Work with the chapter to plan the activities for the year and serve as an ex-officio member of committees with vote if this is a part of the chapter rules
- Notify the state organization of changes of officers during the biennium
- Complete the Chapter President's Annual Report form (if required by your state organization) and mail the report to the person designated on the form
- Work with the membership chair and the treasurer to contact each member who has not paid dues before she is dropped for non-payment of dues

## Documents and publications for president's file

Current *Constitution and International Standing Rules*  
Current *Go-To Guide for Chapter Members: Handbook of The Delta Kappa Gamma Society International* (download latest version from [www.dkg.org](http://www.dkg.org))  
State organization bylaws  
State organization standing rules  
Chapter rules  
Chapter charter (or kept in chapter archives)  
Official Inductee Register (share with Membership chair)  
State organization directory (if available)  
*Our Heritage*, Volumes I & II (Society history)  
H3, *Our Heritage*, Volume III (1970-2008) available on DVD

## Membership Supplies

Society marketing and membership brochure (A Journey for Life)  
Membership certificates  
Chapter yearbooks (or in chapter archives)  
*Pride in the Big Picture* (orientation – download from [www.dkg.org](http://www.dkg.org))  
*Sustaining Pride in the Big Picture* (reorientation – download from [www.dkg.org](http://www.dkg.org))  
New Member Kit

## Reports

**(All forms are available as interactive pages on the website [www.dkg.org](http://www.dkg.org).)**  
Order form for official Society jewelry and available Society induction paraphernalia  
Membership recruitment and retention materials  
Application for Transfer (Form TR-A)  
Report of Death of a Member (Form 6)

### Reports

- A file of reports for the past biennium, including
- ✓ Chapter Report (*No report required by International but a Chapter Presidents' Report may be required by state organization president – please contact your president*)
  - ✓ Necrology
  - ✓ Chapter Treasurer

**Note:** *There was a change in chapter reporting in 2018. Chapter reports except for Necrology and the Treasurer's Report were eliminated at the international level.*

## Chapter Executive Board

The members of the chapter executive board are the elected officers of the chapter, the immediate past president and such other voting members as determined by the chapter. The parliamentarian is an ex-officio member without vote as is treasurer without vote, if under remunerative contract for her services. (Article VII.C.1)

At least two meetings of the chapter executive board are held each year (four during the biennium). The board may meet at other times upon the call of the president. A quorum shall be a majority of the voting members of the board.

Unless sensitive matters, such as personnel issues, are being discussed, meetings of the executive board should be open to the public. Presidents are encouraged to invite other members who are stakeholders in the health and growth of the chapter, such as the membership chair and other committee chairs, to participate in the meetings (without vote). The inclusion of members in executive board meetings not only promotes transparency but also nurtures new leaders.

According to the *Constitution* (Article VII.C.2), the duties of the chapter executive board include the following:

- Select the treasurer for the biennium;
- Act in matters requiring immediate action and decision;
- Recommend policies and procedures for consideration by members; and
- Establish rules for budget development and approval.

Best association practices also encourage the executive board to establish rules for the supervision of chapter finances.

# Chapter Structure, Culture and Inclusion

For a number of years, a dropped member survey has been sent from and analyzed at Society Headquarters. It has become clear that there are important ways to describe chapter life. Two of these are the structure the chapter has developed and the culture or climate of the chapter as perceived by its members - specifically with regard to the level of inclusivity the chapter promotes when recruiting new members, engaging current members and developing new leaders.

## Structure

Structure includes how the chapter is organized. Examples of organization include meeting times and days, number of business meetings held, number of social events held, how dues are collected and when, and what standing committees are designated. Most of these are decisions the members of the chapter decide for themselves and set down in chapter rules. For example, as long as the chapter has a minimum of four business sessions a year, any other business meetings are up to the members. A question a chapter needs to ask about its structure includes how flexible the chapter organization is. If all meetings are held at the same time on the same day of the month, some members with conflicting obligations (school board meetings, classes taught or taken) are permanently disenfranchised. If a small chapter decides to designate a number of standing committees, it is always going to be difficult to populate those committees. If a chapter does not encourage succession planning, it is likely that securing members to be officers will be problematic.

## Culture

Culture of the chapter has to do with how members relate to each other. Is there “top-down” or collegial decision-making? Are cliques tolerated? Is there a warm professional or “sorority” atmosphere? If there is diversity in the chapter, are those members labelled as “other” treated with equality? Is there a mix of programming aimed at different interests and needs of members? Working educators who are dedicated to excellence want information to help them become better teachers. Retired teachers may need programming that will inform them about current economic, social or technological issues. All members seem to be interested in projects that truly “make a difference.” Is there kindness and tolerance demonstrated in the chapter? Is the chapter truly a safe environment to practice leadership skills?

## Inclusion

All educators who identify as women may be invited to membership.

***Research indicates that members walk away from DKG when these issues of structure, culture and inclusion are not considered by the chapter and its leadership.***

# Communications

## Communications from your state organization and Society Headquarters

Expect to hear from your state organization president, the international president and Society Headquarters. You will receive and can obtain information from these entities in a number of ways:

- **Emails from both the state organization and the international president, as well as the staff at Society Headquarters.** Please be sure your name and a current (personal email address preferred) email address are on file and current with both the state organization president and Society Headquarters at all times.
- ***Presidents' Page* – Emailed from Society Headquarters in February, April, June, August, October, and December. This publication includes a column from the international president titled “President to President.”**
- **International committee blogs ([dkg.org](http://dkg.org)) and articles in the *Collegial Exchange* magazine and *DKG News*.**
- **State organization newsletter and website**
- **DKG Society International website at [www.dkg.org](http://www.dkg.org) – Be sure to log in and create a member profile (under the MyDKG tab) to manage your personal contact information and also access important forms and resources**

## Communications with your chapter members

Maintaining frequent communication with your members will both make them feel valued and also encourage engagement. Engagement in chapter activities will increase commitment and promote long term membership.

- Find out what method of communication is preferred by your members
- Be open to providing a variety of ways to share information – not every member will have the same preference:
  - Phone
  - Email
  - Postal mail
  - Newsletters
  - Websites
  - Social Media
- Share the information you receive from your state organization and international with your members
- One easy way to share information is to simply forward the emails from Society Headquarters (including the *Presidents' Page*, if desired) to your members

## Chapter Committees

Work of the chapter may be carried out by committees—either standing committees or special committees. A standing committee is a committee that has a continuing existence established by name in the *Constitution*, state organization bylaws or chapter rules. A special committee is a committee appointed as the need arises to carry out a specific task. A special committee automatically ceases to exist upon completion of the specific task.

The president is an ex officio member of all committees except the Nominations Committee if this statement appears in chapter rules. As an ex officio member, she has a vote. By September the chapter president should have committee appointments made and



have met at least with the chairs. The chapter president should check the state organization bylaws for any committees required by the state organization.

The chapter president is responsible for sending the name and address of the chapter member(s) responsible for the work of each committee to the state organization president or her designee.

At the chapter level it is not always necessary to establish a working group for each committee listed in the international or state organization structure.

The chapter has constitutional responsibility for the work of the following committees at the international level:

- Communications and Marketing
- Finance
- Membership
- Nominations
- Educational Excellence (Program, Personal Growth and Services, Professional Affairs and Research were unified into Educational Excellence Committee in 2010.)
- Scholarship (if the chapter has a fund for scholarships or grants-in-aid)

***Chapters shall establish the structure and/or designate the person(s) responsible for the accomplishment of the work of these committees. Chapters may combine the functions of related committees. Refer to the International Constitution Article VIII for information regarding the duties of these committees.***

***Chapters are further encouraged to promote international scholarship opportunities, connect with World Fellowship recipients, and endorse the international partners and affiliates promoted by the International Non-Dues Revenue Committee.***

Chapter standing committees may be established by chapter written rules. If chapter standing committees are not established, an alternate plan for carrying out the responsibilities and functions must be developed.

## Responsibilities of Committees and Task Groups

Some examples of other optional areas of responsibility are as follows (check state organization bylaws and chapter rules):

- Yearbooks, if utilized, and music may be the responsibility of the Educational Excellence Committee or of another committee/task force
- One member of a standing committee may be given a special responsibility—e.g., a member of the Membership Committee may be asked to compile the history of the chapter.
- Educational law and policy/legislation and recruitment may be the responsibility of the Educational Excellence Committee under the special heading of professional affairs, or chapter rules may establish a standing educational law and policy committee.
- Annual necrology reports may be included in the responsibilities of the Membership Committee. **Whether the responsibility is delegated to a necrology chair or the membership chair, the chapter president is responsible for promptly reporting deaths of members. (Form 6)**
- The chapter should consider submitting names for consideration to the state organization Nominations Committee. Time may be devoted in a chapter meeting to determine how the chapter can participate in planning for the future and in submitting qualified members for officers and committee members to serve at the state organization level.
- The chapter president and the chapter treasurer serve ex officio in the process of budget development and the supervision of chapter finances (mandated). The Finance Committee is selected in accordance with written chapter rules.

## Reports

Reports reflecting specific areas of work may be required by the state organization. Please contact your state organization president for more details.

## Chapter Meetings

Chapters provide a foundation for the Society. All active members are involved in chapter work in order to develop and use their leadership abilities and potential. Active, vital and effective chapter meetings regularly provide opportunities to achieve many goals. A quorum for conducting chapter business shall be determined by each chapter in its chapter rules.

The Society has no official format for all chapter meetings, however the *Constitution* requires as parliamentary authority, *Roberts Rules of Order*. The chapter president, along with her executive board and members, determine the best format for their meetings. **Four (4) regular meetings are required each year. We recommend that chapter meetings do not last longer than is necessary or comfortable for chapter members.**

### Meeting Format suggestions

This suggested order of business for a Delta Kappa Gamma chapter meeting may assist the chapter president to plan effectively—the program may precede or follow the business meeting:

- Call to order by the president
- Challenge and/or inspire—as appropriate for members of the particular chapter
- A record of attendance may be kept but is not required by international guidelines. Attention could focus on members who are ill or in need of chapter support
- Approval of minutes: distributed to members in writing (may be electronic) and approved.
- Treasurer’s report: to be read by the treasurer, a copy given to the recording secretary, and an announcement made by the president that the report will be filed (no vote is required to accept!)
- Correspondence: to be read by the corresponding secretary or officer designated in the chapter rules and action required on any matter arising from correspondence to be taken up under new business
- Report of chapter executive board meeting by the president: action on any matter arising from the board meeting to be taken after conclusion of the report
- Reports: action required on any item in the report to be taken after conclusion of the report, not every committee is required to report
- General orders: any business which regularly comes up at this meeting—e.g., election of officers, voting on members, collection of contributions for special funds
- Unfinished business
- New business
- Adjournment of the business meeting: declared by the president or on motion to adjourn by members.

*Note: Special committee meetings may be scheduled before or after a chapter meeting when needed. See also Appendix F. The Transaction of Business and Sample Order of Business.*

## First meeting of the year

The chapter president can set the tone for the year by displaying enthusiasm for the Society. Some suggestions include the following:

- Appoint a “calling tree” committee or send a newsletter to inform members of the first meeting and all meetings for the year. Use electronic communication when possible
- Express to members their talents will be missed if they are not in attendance at the meetings. Then show them you mean it by inviting them
- Offer transportation to those members who may be in need
- Help members to feel welcome with a get-acquainted session
- Make sure member contact information is updated and current
- Send members information about interesting and exciting programs planned for the year
- Provide information and deadlines for applications for scholarships and projects at all levels of the Society and encourage eligible members to apply

The president with her well-planned agenda should begin the meeting at the appointed time and not make the meeting too lengthy. If members have attended an international conference or convention, a report should be shared with the chapter members. The meeting and program may be concluded with Society music.

The tone is set for the year. Now put your “challenge into action!”

## Getting to know one another

Start with a survey to identify the different professional positions the chapter members represent. Know the make-up of your chapter. Then, at each meeting you may want to try some of the following:

- Seat “like” positions together
- Ask who remembers three members from the previous meeting whom they did not know before. You may want to have a small reward for the effort of each
- At the beginning of each meeting, introduce two members and have each one tell something for which she would like to be remembered
- Before a meeting begins, ask members to sit beside people they do not know or whose names they cannot recall
- Use one meeting to discuss the kinds of programs members would like by having a different “area of interest to women educators” posted in each corner of the room. After each member has found her niche, ask the group to come up with topics under the area and prioritize the list
- Brainstorm with a committee on ways to know your chapter members. You must plan to form friendships and make your chapter members feel comfortable in the group
- Assign mentors to new or transferring members

## Revitalizing

Focus on the positive. From your core of faithful members, look toward a future of growth within the chapter. Start with thinking focused on the future or brainstorming with a few of your members. Discuss ideas such as

- Providing support and fellowship to members: develop car pools, recognize members at each meeting
- Presenting interesting, informative, comprehensive orientation and reorientation sessions
- Making programs so interesting that no one will want to miss them
- Developing diverse programs to engage all members
- Using get-acquainted activities at each meeting
- Involving members in programs
- Limiting the time of business meetings by encouraging well organized meetings: providing agendas, having committee reports, involving the members
- Improving communications. Is your newsletter effective? When a member misses a meeting, do you contact her?
- Nurturing your members and caring about them



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### What characteristics describe a healthy chapter?

A healthy chapter has members who are enthusiastic and committed to the Purposes of the Society. Check out the Chapter Strengthening Tools at [www.dkg.org](http://www.dkg.org) under Tools

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### Is your chapter healthy? Look for these indications:

- Optimally, the chapter has 20 or more involved and participating members
- Not more than 10 percent of the chapter members are reserve members
- New members are inducted each year
- Orientation programs are held for prospective members
- Reorientations are presented each biennium for all members
- There is good attendance at all chapter meetings
- Programs have professional substance and are related to the Delta Kappa Gamma Purposes and Mission
- All members participate in a variety of ways
- Executive Board meetings are held regularly (a minimum of 4 each biennium)
- Members attend council, area, state organization, international functions
- Funds are budgeted to assist the president's attendance at council, area, state organization, international functions
- Members are enthusiastic about Delta Kappa Gamma
- Members are willing to serve as officers and committee chairs
- Written, electronic and telephone communications are excellent
- Reports and requested documents are submitted on time

## Transaction of Business

An effective leader approaches every meeting with a definite agenda. To expedite business this agenda must be followed. The agenda approved by the National Association of Parliamentarians given below may be useful.

After adoption of the agenda, the Order of Business may be changed by a motion to suspend the rules. Such a motion requires a second and a two-thirds vote.

### Sample Order of Business

1. **Call to Order:** The chair calls the meeting to order with a firm rap of the gavel with the statement, "The meeting will come to order."
2. **Opening Ceremonies:** i.e., music, inspiration, etc.
3. **Rules of Order:** The chair asks the parliamentarian to present the rules of order for the day. The rules should be adopted by general consent or by a motion which is seconded and which receives a majority vote of approval.
4. **Introduction of Guests:** Guests may be introduced here or later.
5. **Adoption of the agenda**
6. **Roll Call:** If a roll call is required, it is taken by the secretary.
7. **Minutes:** If the minutes have been distributed previously, the secretary does not read them. Neither are they read if they have been approved by a committee assigned to do so. The chair declares the minutes approved. If there are corrections, these are acted upon by general consent, or by motion. Such a motion must be seconded and requires a majority vote for approval. When approved the chair declares the minutes approved as corrected.
8. **Correspondence:** Correspondence is read by the secretary. If action is required, it may be taken at once or delayed for new business.
9. **Report of the Treasurer:** The treasurer makes the report and the chair asks if there are any questions, if not, the chair states that the report will be filed. When an audit or annual review is necessary, a report must be adopted by the assembly. (Refer to chapter rules)
10. **Reports of Officers:** If the executive committee reports as a group, the secretary reads a summary of actions. She does not read the minutes of the group. If recommendations are made, the secretary moves their adoption or they may be deferred to new business.
11. **Standing Committees:** Committee chairmen make their reports in the order in which they are listed in the Bylaws. The report may be made by a substitute approved by the president.
12. **Special Committees:** The same rules apply as for standing committees.



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### Do I have to use *Roberts Rules of Order* in my chapter?

Chapter business should be conducted in such a manner that every member can participate and be heard. *Roberts Rules of Order* (which governs all international proceedings per the *Constitution*) is one way to provide structure to your meeting. However, any method that allows business to be conducted in a professional and orderly manner can be used.

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13. **Special Orders:** This includes any postponed item which was made a special order for this meeting.
14. **Unfinished Business:** Business postponed or unfinished from a previous meeting. It is not called "old" business.
15. **New Business:** All business items must be introduced by a main motion and require a second. the motion is open for debate, amendment, postponement, etc. After action, the chair takes the vote, announces the result, and states what action will be taken.
16. **Announcements:** Made by the chair or her designee(s). The chair may call for other announcements from the floor.
17. **Program:** A program may be scheduled in the agenda as desired, preferably before or following the business session. The meeting is not turned over to the program chairman. The chair is in command at all times and calls upon the program chairman to present the program. If circumstances make it desirable to move the placement of the program, it may be done by suspending the rules.
18. **Adjournment:** The chair asks if there is further business. If not, she may declare the meeting adjourned. If there is no objection, the chair must entertain a motion and second. The chair states the motion and puts it to vote. It requires a majority. If the motion carries, the chair announces the vote and says. "The meeting is adjourned."

Reference: *Robert's Rules of Order Newly Revised*. 11th Edition. Perseus Publishing, Cambridge, Massachusetts 2000

# Chapter Finances

## Budget

The chapter executive board shall establish rules for budget development and approval and for the supervision of chapter finances. The chapter president and the chapter treasurer shall serve as ex-officio in the procedure that is established. Chapters should assign responsibilities and establish rules for activities such as the following:

- Voting on the amount of chapter dues and assessments
- Preparing the chapter budget
- Reviewing, modifying and adopting the budget by the chapter executive board and/or chapter membership
- Supervising expenditures
- Supervising investments
- Providing for an annual review of the accounts of the chapter
- Filing for the IRS 990 (only in the U.S.)

The fiscal year of the Society **begins July 1** and ends **June 30**.

## Dues and Fees

**Induction fees, scholarship fees, and dues are paid to the chapter treasurer.**

**The international dues are as follows:**

- Honorary members is U.S. \$49.50 (one-time fee)
- Active members pay U.S. \$40.00.
- Reserve members pay U.S. \$20.00
- Collegiate members pay U.S. \$20.00

**An active member shall pay an induction fee at the time of induction. The induction fee is U.S. \$10.00. The breakdown is as follows:**

Chapter keeps U.S. \$7.50 and the State Organization keeps U.S. \$2.50

The inducting unit of the Society shall pay a lifetime fee for each honorary member at the time she becomes a member.

**A U.S. \$1.00 scholarship fee is annually collected at the chapter level from active and reserve members. The breakdown is as follows:**

One hundred percent (100%) goes to the state organization if the chapter does not maintain a scholarship fund or twenty percent (20%) to the state organization if the chapter does maintain a chapter scholarship fund. Eighty percent (80%) is retained by the chapter having a scholarship fund. A portion no longer comes to international.

## Payment of Dues and Fees

Dues and fees are payable by June 30 each year. State organization and chapter dues are set by individual chapters and state organizations. Active members inducted on or after Jan 1 pay induction fees, pro-rated international dues, chapter and state organization dues and scholarship fees. Immediately thereafter the state organization and International portions of the dues must be sent to the state organization treasurer and International respectively. Dues and scholarship fees for the ensuing year must be paid no later than June 30 to the chapter. Scholarship fees are only paid to the chapter and state organization. No portion of the scholarship fee is paid to International.

In order to pay the dues for the state organization and International, the chapter treasurer needs to follow the instructions located on chapter connect on the Society website at [www.dkg.org](http://www.dkg.org)

## Dues Collection Timeline

- April 1 – Dues Collection portal opens for the upcoming membership year. Chapters begin sending dues to international and state organizations (separate checks to each entity for respective portion)
- June 30 – Member dues collection deadline (to chapter). Begin collecting in April, May and June for the upcoming membership year.
- August 1 – Automated notices are emailed to members whose dues have not been paid (with email address on file with Society Headquarters). Email reminders will also be sent to all treasurers to remind them to reach out to members who have not paid dues.
- September 1 – Second automated notices are emailed to members whose dues have not been paid. Email reminders will also be sent to all treasurers to remind them that members who have not paid dues will be dropped October 1 if dues are not received.
- October 1 – Members whose dues have not been paid will be dropped.

**DKG has no reinstatement fee.** Reinstated members pay dues and fees in accordance with the above schedule. Pro-rated dues after January 1 will not be an option for reinstated members who were listed as active members on the rosters at the beginning of the current dues collection period.

## Managing new members and member status

Presidents, membership chairs and treasurers should work together to insure new members are engaged and remain active after induction. Membership numbers are issued when the chapter treasurer puts the name of the new member and their join date into the dues payment portal when they pay their dues. Without a member ID number, the new member is unable to access member benefits such as the website, resources, or publications.



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### What do we do when a member is unable to pay dues because of a physical and/or mental disability – or due to age related issues?

The chapter may vote to pay the dues for members who are impaired so that membership may continue. Or individual members may choose to pay the member's dues.



A member who is unable to pay her dues as a result of age related challenges, physical disability or even confinement to a nursing facility may not be aware that her dues have not been paid or may have no way of paying her dues. The chapter may vote to pay her dues or may wave chapter due and pay her dues to the state organization and International. Reserve membership may also be an option for her.

In addition, the president, treasurer and membership chair should work together to encourage all members to renew membership each year. When the treasurer identifies members who have not yet paid dues, the president and membership chair should contact them to remind them they are valued members of the chapter. You may also ask other members in the chapter to assist with this task. A dues reminder card (Form 123) is available at [www.dkg.org](http://www.dkg.org) for both mail and email under treasurer forms.

Developing strategies that assist members who encounter financial challenges in regard to dues payment can also help these members stay active and engaged. Installment plans, for example, would enable members on restricted incomes to pay dues over time until the final due date in June.

## Duties of Chapter Treasurers

The duties of the treasurer at the chapter level are delineated in the *Constitution* (Article VI, C, 9):

- Receive and pay out all monies belonging to the organization
- Keep an accurate account of receipts and expenditures
- Maintain a record of receipts, bills and bank statements
- Present a report at each regular meeting
- File required tax reports
- Submit for annual audit/financial review the accounts of the organization
- Serve as a member, ex officio, without vote if under remunerative contract for her services, on the respective executive board
- Serve as a consultant in the process of budget development and supervision of finances
- Maintain an accurate and current membership roster

In addition, chapter treasurers should:

- Collaborate with the state organization president and membership chair to coordinate membership recruitment and retention
- Follow appropriate procedures to ensure the safety and proper handling of chapter monies as established by the chapter Finance Committee

**Note:** *When treasurers change, the outgoing treasurer should see that the new treasurer has the needed materials and instructions and that [societyoper@dkg.org](mailto:societyoper@dkg.org) is notified. International will report the change in treasurer to the IRS.*

## Beginning the fiscal year

The fiscal year for The Delta Kappa Gamma Society International runs from July 1 through June 30, inclusive. The duties of the new treasurer begin on July 1.

### Budget

A budget is the financial statement of estimated income and expenses prepared by the Finance Committee with the treasurer serving as consultant. The treasurer will furnish necessary information. The Finance Committee presents the budget to the chapter executive board.

### Paying the Bills

The treasurer pays the bills approved by the chapter president as authorized in the budget or through chapter actions. Bills should be rectified before payment in a timely manner and receipts should be filed for financial review.

### Accounting and membership documents

- Access to MyDKG through the society website at [www.dkg.org](http://www.dkg.org)
- Treasurer/membership documents located under the Forms tab
- Treasurer's accounting software – Excel or QuickBooks recommended

### Permanent Files

Treasurers should review their permanent files. Permanent files should have the following:

- Approved invoice or reimbursement forms, receipts and bank statements;
- Chapter Treasurer's Ledger/computer summary printouts;
- Chapter copies of Form 15;
- Copy of annual financial review statement;
- Chapter membership records; and
- Copy of IRS 990 filing (for U.S. chapters only).

### Bank accounts

All chapter money should be deposited in an account in the name of (Name) Chapter, The Delta Kappa Gamma Society International. The name of the chapter president and the chapter treasurer are required as signers on all financial accounts for the chapter. This needs to be updated if there is a change. **The treasurer must never deposit chapter money into a personal bank account.**

## Responsibilities

Review governing Society documents regularly including the current *Constitution* and *International Standing Rules* and the current state organization's bylaws/standing rules and chapter rules.

Collect the proper dues and fees.

Give a financial report at each meeting during the year including a summary of expenses and income or for the period since the last meeting, and the balance on any invested funds.

Maintain an accurate membership roster on Chapter Connect.

Make an annual report on Form 15 to the state organization treasurer.

File annually between July 1 and November 15, a Form 990n report for the Internal Revenue Service (for U.S. chapters only). Send a confirmation of the 990 filing to the state organization treasurer. The link to file these forms is available under Chapter Connect in MyDKG.

Work collaboratively with the state organization president, membership chair and finance committee. Again, the chapter president and chapter treasurer should be listed as signers on all financial accounts.

Follow appropriate procedures to ensure the safety and proper handling of chapter monies as established by the chapter Finance Committee.

## Non-dues Revenue

Non-dues revenue is income that comes from sources other than dues and may be utilized at the chapter's discretion. Check state laws for any regulations or tax implications.

## Finances

### Making Contributions

Contributions to various funds at the state organization and international levels are reported on Form 43. All international contributions must be sent with Form 43 to Society Headquarters, The Delta Kappa Gamma Society International, 416 W. 12<sup>th</sup> St., Austin, Texas 78701. Credit card contributions may be made through the online contribution form on the Society website at [www.dkg.org](http://www.dkg.org).



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## Why must a separate Form 43 and check be sent for each specified donation?

The Society maintains separate accounts for each fund and this procedure ensures accurate, efficient, and timely deposits without extra fees.

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## Reporting Contributions

**A separate Form 43 must be completed for each gift with only one specified fund per form.** A separate check, wire or credit card is required for the amount submitted to each specified international fund. For example, one payment must be made payable to the Emergency Fund, and another payment payable to World Fellowship Fund. If a chapter collects a number of checks made out to the World Fellowship Fund, they may use one Form 43 and put the total of the checks on the form.

Any contribution must be written out directly to the fund by the donor in order to receive a personal letter for U.S. tax purposes.

## Donating to the DKG Educational Foundation

Gifts also may be sent to The Delta Kappa Gamma Educational Foundation. Contributions to the Educational Foundation, a 501(c)(3) U.S. federal income tax-exempt corporation, are deductible for federal income tax purposes in the U.S. and some other countries.

## Donating to the DKG Supporting Corporation

Contributions to the DKG Supporting Corporation, a 501 (c) (3) are tax deductible to the fullest extent of the law in the U.S. and some other countries. These funds include the Educators Book Award, Emergency Fund, Golden Gift Fund, Eunah Temple Holden Leadership Fund, International Speakers Fund, Scholarship Fund and World Fellowship Fund. To claim this deduction, complete Form 43 and make a check payable to the specific fund. Donations may be made online with a credit card as stated above.

## Funds

Member dues support the work of the Society.

A chapter must maintain an Available Fund and may create a Scholarship Fund if, by a majority vote, the members determine to do.

**Once money is designated for scholarship, it may not be used for other purposes.** The chapter may add to its fund from such other sources, as it may determine.

## Other Membership Procedures

For procedures for members reinstating, please refer to Treasurer Training PowerPoint for transferring and reinstating members on Chapter Connect on the Society website at [www.dkg.org](http://www.dkg.org).

## Ordering Society Jewelry and Paraphernalia

When a member wants to purchase Society jewelry it must be ordered from Award Concepts, the official jeweler for the Society. Information is available online through the Society store on the international website at [www.dkg.org](http://www.dkg.org). Chapters may decide to purchase jewelry for members.



The chapter president's bar pin may be presented to the president by her chapter at the time of her installation.

A separate order form for paraphernalia is used to order the induction candleholders as well as the large brass induction candlestick, brass induction bowl, chapter president's rosewood gavel, official red satin scarf, and official banner. Order forms are available from Awards Concepts, Inc., online.



Award Concepts produces a line of DKG branded products available on the Award Concepts website which is linked at [www.dkg.org](http://www.dkg.org) under the DKG Store icon.



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We thought World Fellowship recipients could not be from any of our member countries and yet this year there were several. What are the facts?

World Fellowship recipients may be from any country with the exception of countries where there are designated university sites. As of January 1, 2004, there are designated sites in Canada and the U.S., so citizens of those two member countries cannot be World Fellowship recipients.



## Other Forms and Material

Check the Society website under forms for additional materials. (See Links and Resources)

## Internal Revenue Service Information (U.S. State Organizations only)

### Tax Exempt Status

The Delta Kappa Gamma Society International is tax-exempt under Section 501(c)(6) of the U.S. Internal Revenue Code. This exemption is an exemption from paying federal income taxes. It does not allow for exemption from state and local sales taxes charged on items purchased by the chapter.

The Delta Kappa Gamma Educational Foundation is a 501(c)(3) U.S. federal income tax-exempt corporation. Contributions to the Foundation are deductible on federal income tax in the U.S. and some member countries.

The DKG Supporting Corporation is a 501(c)(3) and donations to the seven funds in the corporation are tax deductible in the U.S. and some member countries. Questions frequently arise about allowable fund-raising activities under 501(c)(6). Income that is unrelated to the tax-exempt nature of the organization may be taxable. To be taxable, income must be from a business not substantially related to the exercise of the charitable, educational or professional purposes on which the exemption of the organization is based. If the organization sells items to non-members income could be considered taxable. Check state laws.

### Employer Identification Number

The Internal Revenue Service requires each unit of the Society to have an Employer Identification Number (EIN). This number is assigned by the Internal Revenue Service. International and each state organization, chapter, and coordinating council of the Society (U.S.) are required to present this number to any financial institution that pays interest on accounts.

When a new chapter is organized, Society Headquarters applies for the Employer Identification Number (EIN). When the chapter treasurer receives the EIN from the IRS, a copy of the letter should be emailed to the Business Director at Society Headquarters at [societyoper@dkg.org](mailto:societyoper@dkg.org).

A complete list of Employer Identification Numbers is kept on file at Society Headquarters. Any changes in treasurers must be report to the Business Director at Society Headquarters at [societyoper@dkg.org](mailto:societyoper@dkg.org)

Each unit of the Society should have only one EIN. It is the treasurer's responsibility to keep this number and record it in financial records. All banks will require this information. Keep all correspondence from the IRS for chapter records. Also, do not ignore letters from the IRS. The chapter treasurer is the only one who receives correspondence on the chapter.

The EIN is a nine-digit number and is frequently confused with personal Social Security numbers. Under no circumstances should a treasurer ever use a personal Social Security number for a Society account.

## Internal Revenue Service Reports

All U.S. chapters and U.S. state organizations and any other entities of DKG that have a separate EIN are required by the Internal Revenue Service to file annually a Form 990 or file the Form 990n electronically between July 1 and November 15 of each year. The filing of the Form 990 or 990n is based on annual gross income. Gross income means the amount of income for the year for the chapter only, not the total money the treasurer may have handled that belongs to another unit of the Society. This is reported at each level. If the gross income for the year is not more than \$50,000, the chapter or state organization must file a 990n electronically. You can find a direct link and the process on the Society website in Chapter Connect. If a chapter or state organization has an income of more than \$50,000, it must complete the Form 990 available through your local accountant or on the IRS website. If a treasurer has any problem with the filing, she should contact the Business Director at Society Headquarters at 512.478.5748.

The fiscal year on the report should be July 1 to June 30. If the fiscal year is incorrect, email [societypoper@dkg.org](mailto:societypoper@dkg.org) with the name of the chapter treasurer, email address, mailing address, chapter name and EIN. International will send a letter to the IRS on your behalf and send an electronic copy for the chapter or state organization files.

All chapter treasurers and coordinating councils must send confirmation of Form 990n filing to their state organization treasurer. **Do not wait until the last minute to file. File as soon after July 1 as you can. In some cases there is something that needs to be changed with the IRS, like the filing year. It generally takes at least six to eight weeks for the IRS to make the change.**

**All U.S. treasurers of chapters, state organizations, coordinating councils and any other funds with a separate EIN must file a Form 990 or a Form 990n with the IRS annually. The IRS will automatically revoke the tax exemption status of any unit failing to satisfy its filing requirements for three consecutive years. The automatic revocation is effective on the due date of the third required annual filing. This means that the chapter, state organization or coordinating council will lose its non-profit status under the DKG group ruling and its income will become taxable.**

Because The Delta Kappa Gamma Society International is tax-exempt under Section 501(c)(6) of the U.S. Internal Revenue Code, it is important to note that the exemption is from federal income tax only. State organizations or chapters are not exempt from paying state and local sales tax.

Member countries other than the United States should check with their governments concerning required reports.

## Coordinating Councils

Some state organizations have a separate bank account for coordinating councils with a separate EIN number. Some use the EIN number of a chapter. When the EIN is the same as the chapter, the income is reported under the chapter filing. When there is a separate EIN, the treasurer of the coordinating council needs to file a separate 990n electronically, if income is under \$50,000.



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So, if our chapter has a “white elephant” auction and just sells items to members, are we ok?

Yes. But if your chapter held a Bingo game and invited the community, any income could be considered taxable.

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## Suggested Retention Schedule

Type of Record	Legal Period
Bank Deposit Slips	7 years
Bank Statements/Reconciliations	7 years
Accounts Receivable/Accounts Payable	7 years
General Ledger/Journal	Permanent
Cash disbursements/Cash Receipts Journals	Permanent
Authorization & Appropriation for Expenditures	7 years
Petty Cash Vouchers	7 years
Invoices	7 years
Auditor Reports/Financial Reviews	Permanent
Budget Reports	4 years
Revenue and Expenditure – Fiscal Year July 1 – June 30	7 years
Membership Form 18 Printout/Online new dues report	7 years
Membership List	4 years (at least)
Inventories of materials and supplies	4 years
Tax Returns – Federal 990 (US Only)	Permanent
Employee Payroll Records, timesheets, W-2 and W-4 records	7 years
Employee Expense Reports	7 years
Employee Applications	3 years
Employee Files	7 years after employment ends
State Organization Convention Financial Records	7 Years
Contracts	10 years from termination
Insurance Policies	Current
Leases	10 years from termination
Real Estate Purchases	20 years after sale
Annual Reports	Permanent
Articles of Incorporation	Permanent
Constitution/ Bylaws/Rules	Current
Minutes	Permanent

The members of the Financial Review Committee are the examiners of accounts (sometimes referred to as the Audit Committee). They are expected to examine all records and certify to the accuracy of these records. The organization holds this Committee accountable for any unexplained inaccuracies that may be found in the future in materials they have reviewed.

The following is the minimum checking that should be made in a financial review:

1. All financial accounts are in the name of a state organization or chapter of the Society, not in the name of an individual.
2. Signatures, including president and treasurer, on all bank accounts and investments are current.
3. The correct Employer Identification Number (EIN) is on file.
4. Form 990N, Form 990EZ, or Form 990 was filed with the IRS for U.S. chapters, coordinating councils, separate scholarship funds, state organizations, and foundations (if applicable).
5. The correct amount was collected for each type of membership.
6. Proper distribution was made for each type of membership fee and recorded.
7. Correct amounts were sent promptly to the Society Headquarters/state organization treasurer for international and/or state organization dues and fees.
8. Bank statements were properly reconciled each month with the book balance and the checkbook balance.
9. The total amount of funds received during the year was deposited to chapter or state organization bank account within a reasonable time.
10. The total amount of checks written equaled the total amount of expenditures recorded on the books.
11. The cash balance at the beginning of the year plus (+) receipts during the year minus (-) disbursements during the year equaled (=) the balance at the end of the year.
12. All expenditures were approved by the president.
13. All expenditures were supported by documentation.
14. All expenditures were supported by budget allocations or by actions recorded in the official minutes of the organization.
15. All directives and limitations regarding finances, as recorded in the minutes of the organization, were followed.
16. Special contributions were received and/or disbursed in accordance with their intended purpose.
17. All fund transfers were made in a timely manner.
18. State organization Investment Policy is current.
19. A list of current bonds, securities and other investments is available, providing the following information for each investment: a) type of investment; b) principal amount; c) maturity date; d) name of financial institutions; e) physical location of documents; and f) correct amount of investment income recorded at time earned.

## International Guidelines for Sale of Items

The following guidelines are in compliance with articles of the Constitution and International Standing Rules dealing with the sale of items and the use of Society symbols. The Delta Kappa Gamma Society (DKG) is a not-for-profit organization classified under Section 501 (c) (6) of the U.S. Internal Revenue Code. The Society is not exempt from payment of sales tax. State organizations should investigate the sales tax requirements in their respective states, provinces and countries and adhere to them. Failure to comply with sales tax requirements will put the Society in jeopardy of losing its not-for-profit, 501 (c) (6) status.

Many state organizations have developed sale items to support activities congruent with the purposes and projects of DKG. These items provide visibility for the Society and should reflect a professional image.

### **Guidelines:**

1. Sale of items by vendors should be scheduled at times other than Society general sessions or business meetings.
2. Items should reflect the professional image of the Society.
3. Items may be advertised in state organization or chapter newsletters or brochures, consistent with postal regulations.
4. Society websites will include no direct advertising except for International Non-dues Revenue partnerships or fundraising by members that benefit state organizations and/or chapters. (International Non-dues Revenue partnerships include the Society jeweler, insurance partners, and approved international partnerships. Fundraising by individual members does not include third-party business agreements.)
5. All vendors are responsible for obtaining all required governmental (state, province, county, city, country) sales tax numbers in the location where the event is held. All vendors are responsible for paying all applicable sales taxes to the governmental unit.
6. Permission must be obtained for any materials protected by copyright.

DKG has adopted the following governing rules pertaining to the sale of items:

*Constitution, Article X, Section A.3*

### **3. On-Site Sales**

- a. A state organization desiring to sell items at conventions and conferences shall follow the international guidelines for sale of items.
- b. Each vendor/exhibitor approved to sell items at conventions and conferences shall pay a fee determined by the Administrative Board. A list of approved vendors/exhibitors shall be provided to appropriate convention/conference personnel.

*Adopted by Administrative Board – November 17, 2010*

*Approved with updates by the Administrative Board – November 8, 2013*

*Approved with updates from International Non-dues Revenue Committee – December 1, 2019*

**Updates to this above document are pending administrative board approval November 2019.**

## Pride in Being the Chapter Membership Chair

Membership continually helps each member to mature as a contributor to the organization and a benefactor of the Society. Providing the leadership for your chapter as Membership Chair will require both careful planning and persistent monitoring.

Delta Kappa Gamma has no small jobs. That statement is especially true for the responsibilities assigned to the Membership Chair. The work of membership is a vital “constant” in the life of our Society. Among the responsibilities of membership may be the following:

### **Identify, Invite and Induct**

Use the Membership Recruitment Plan and the *Pride in the Big Picture* orientation. The orientation presentation provides a way to give prospective members a clear and thorough understanding of the Society before they respond to the invitation to membership.

### **Re-inspire, Re-Build and Re-Affirm**

Use the *Sustaining Pride in the Big Picture* reorientation presentation. The reorientation presentation is for use as a whole or in part during chapter meetings.

### **Track and document members’ data**

Chapters use membership data (attendance, member involvement, and other data as suggested in this guide) to further membership recruitment efforts.

### **Problem-solve membership issues**

Chapters develop action plans to ensure they are building member engagement and chapter sustainability.

### **Seek support when chapter is in distress**

Call upon the expertise of state organization officers and state organization membership chair.

### **Celebrate members’ accomplishments**

Celebrating members’ achievements is the most effective means of developing positive relationships among members. When members feel nurtured and valued, they are far more likely to be involved in chapter activities.

### **Honor deceased members**

Chapters take time to respectfully give deceased members tribute for their devotion and dedication to the field of education and to the Society.

# Membership Committee

## Duties of Chapter Membership Committee Chair and Committee

1. Distribute prospect cards to members at a chapter meeting several months before induction.
2. Review types of membership: Active, Reserve, Collegiate, and Honorary.
3. Review qualifications of persons whose names have been submitted on prospect cards to ensure they are eligible for membership. New members shall be selected by the method established by the chapter's rules.
4. Send invitation letters to prospective members on the approved list.
5. Conduct an orientation using *Pride in the Big Picture*. The orientation can be at a chapter meeting or a special event. Make sure enough members are coming to the meeting to match the number of new members.
6. Assign a member mentor/buddy to each prospective member coming to the orientation event. Provide Chapter Membership Application (Formerly Form 11) forms for each prospective member to complete.
7. Send the induction letter to prospective members who accepted the invitation to membership at the Orientation event. The prospective member shall be inducted as soon as possible.
8. Keep a record of invitations sent and responses. An educator who is unable to join when membership is first offered may be considered for membership again.
9. Prepare for the induction ceremony using an appropriate ceremony (visit [www.dkg.org](http://www.dkg.org) and Resources to find sample ceremonies). Ceremonies may be adapted to meet chapter needs.
10. Order a New Member Information Kit to present to each educator at the time of her induction.
11. Order membership certificates (with current international president's signature) to present to the educator at the time of her induction. Order keypins, if the chapter gifts them to new members at induction.
12. Present the new inductee with the Inductee Card to submit to the state organization treasurer.
13. Keep an up-to-date file of the Chapter Member Biographical Data Sheet (Form 82). This form provides information on the diversity of the chapter and pertinent information on member's professional career, community service, honors, and DKG positions.
14. Survey members to explore needs and preferences. Submit results to the executive board/committee. This information provides important facts needed to make data driven decisions in the development of the chapter action plan.
15. Work with the chapter president to report deceased members, verifying member biographical data. Prepare the Necrology Report (Form 2) if there is no chapter necrology committee. This report is due February 1 of each year if your state organization requires.
16. Conduct reorientation programs using the *Sustaining Pride in the Big Picture: A Reorientation Guide* for all DKG Members at least once a year.
17. Provide the chapter with the membership and marketing brochure, *A Journey for Life*, for marketing the Society to prospective members and communities.
18. Contact Society Headquarters at any time to ensure your success as the chapter membership chair.

## Communication

As membership chair you help to set the tone of your chapter. Setting the tone means communicating with all members in a positive and nurturing way. But it goes deeper than that; communicating involves almost every aspect of our interactions with others. We communicate our attitudes, beliefs, values, priorities, and feelings toward others not only by what we say but also by how we say it. You, as the membership chair, will affect how prospective and new members respond to DKG at the chapter level. The opinions they form about us are based on the way the chapter members communicate with them. Your body language, facial expressions, tone of voice, and level of interest are also very important. Bottom line – you are the face of DKG. Make it one of PRIDE!

Suggestions for being a role model and setting the tone for good chapter relationships

1. Greet members and guests as they arrive at the meeting.
2. Introduce new members and guests to others.
3. Survey the room to ensure that all members feel welcome.
4. Show your pride in being a DKG member; use your elevator speech.
5. Thank members and guests for coming as they leave, and tell them you look forward to seeing them at the next meeting (state the date, location and time).
6. Provide meaningful orientations, inductions and reorientations.
7. Assign new, reinstated and transferred members a mentor/buddy so they will transition easily into the chapter.

## Management of Membership Records

Membership records are among the most important records of the Society. **The state organization/chapter minutes are official documents and any membership action should be a part of the minutes.** This includes:

- Inductions (vote required), via portal and Chapter Membership Application (formerly Form 11)
- Reinstatements (no vote to be taken), via dues portal
- Honorary member elections (vote required), via dues portal and Chapter Membership Application (Formerly Form 11)
- Transfers (no vote to be taken), via dues portal
- Resignations, Form 18-A
- Dropped memberships, Form 18-A
- Changes in membership status (vote required), via dues portal
- Tributes to deceased members, Form 2 (if required by state organization) and Form 6

**Rosters, minutes, and biennial reports should be kept as permanent records of the chapter.** Guidelines for retention of financial and legal documents are given to state organization and chapter treasurers. The extent of purging membership records is at the discretion of the individual chapter.

The functional value of membership information

- Current *Chapter Member Biographical Data Sheet* (Form 82) information for each member serves to help plan diversity in membership and to know the expertise of members. The key is accuracy – these forms should be updated biennially.
- *Treasurer's Report and Dues Portal* (with Form 18-A) serves to keep membership records accurate and to determine why the state organization and/or chapter might be losing or gaining members.
- *Necrology Report* documents the number of deceased members with the biennium. (Form 6 and Form 2, if required by state organization)
- Keeping names and contact information of dropped members makes it is easier to contact them about reinstatement.

## Membership Resources

As the membership chair, you should take an inventory of membership resources necessary for the work of membership. The following is a list of resources for easy reference:

1. Tools>Chapter Tools at [dkg.org](http://dkg.org)
2. Chapter Membership Action Plan
3. *Guidelines for State Organization and Chapter Finance Committee* (for document retention)
4. Inductee Cards (Form 81 – for chapter/state organization use only, sent to international via dues portal)
5. Membership/Recruitment Plan and accompanying documents
6. Society Membership & Marketing brochure, *A Journey for Life*
7. Chapter Member Biographical Data Sheet (Form 82)
8. Membership Announcement Cards/envelopes
9. Membership Certificate – Chapter (Inductees)
10. International Membership Committee articles in the *DKG NEWS* and the *Collegial Exchange* magazine
11. Membership Committee blog (see Society Blogs [www.dkg.org](http://www.dkg.org))
12. Necrology Report (Form 2, if required by state organization)
13. New Member Information Kit
14. Official Inductee Register
15. Paraphernalia Order Forms (Award Concepts, Inc.)
16. *Pride in the Big Picture Orientation* (PowerPoint and Video)
17. Chapter Membership Application (Formerly Form 11)
18. Reinstatement (Form 83)
19. Report of the Death of a Member (Form 6)
20. *Sustaining Pride in the Big Picture Reorientation* (PowerPoint and Video)

## Opportunities for Members

If a member is looking for:	Consider these opportunities:
Financial support for study beyond the bachelor's degree	<ul style="list-style-type: none"> <li>– International scholarships – 30 scholarships available each year: \$10,000 for doctoral study, \$6,000 for other graduate study,</li> <li>– State organization and chapter scholarships*</li> </ul>
Financial support for one-time professional development	<ul style="list-style-type: none"> <li>– DKG Educational Foundation Cornetet Awards – one- time individual awards of up to \$2,000</li> <li>– State Organization Professional Development Awards*</li> <li>– Chapter grants*</li> </ul>
Financial support for classroom/school/community project	<ul style="list-style-type: none"> <li>– DKG Educational Foundation Project Awards</li> <li>– State Organization Foundation grants*</li> <li>– Chapter mini-grants*</li> </ul>
Leadership training for professional growth	<ul style="list-style-type: none"> <li>– International Leadership/Management Seminar – graduate training valued at more than \$8,000; if selected to attend, recipients pay a registration fee</li> <li>– International conventions/conferences</li> <li>– State organization conventions/conferences*</li> <li>– State organization leadership seminars*</li> <li>– Society sponsored parliamentary training</li> </ul>
Speaker or presenter opportunities	<ul style="list-style-type: none"> <li>– International Speakers Fund speaker on topics of personal/professional expertise</li> <li>– Chapter programs</li> <li>– Area, state organization, international workshops</li> <li>– Keynote speakers at Society meetings</li> </ul>
Emergency assistance Member has a major loss from floods, tornados, earth quakes, or other catastrophic event of nature.	<ul style="list-style-type: none"> <li>– International Emergency Fund, \$500 per event, per member</li> </ul>
Recognition for an earned doctorate	<ul style="list-style-type: none"> <li>– Listing in program and recognition at international convention</li> </ul>
Leadership opportunities in a nurturing environment	<ul style="list-style-type: none"> <li>– Chapter officer/committee chair/member positions</li> <li>– State organization committee member/chair</li> <li>– State organization officer positions</li> <li>– International committee member/chair</li> <li>– International administrative board member/officer</li> </ul>
Service to community/state/the world	<ul style="list-style-type: none"> <li>– International <i>Schools for Africa</i> project support</li> <li>– Support for local early-career educators</li> <li>– State organization service project support*</li> <li>– Chapter service project participation*</li> </ul>

Professional Networking	<ul style="list-style-type: none"> <li>– DKG Communities</li> <li>– International/State organization conventions/conferences</li> <li>– Chapter meetings</li> <li>– Service at state/international levels</li> </ul>
An audience for professional writing	<ul style="list-style-type: none"> <li>– <i>The DKG Bulletin</i> – juried, professional journal</li> <li>– <i>The Collegial Exchange</i> magazine</li> <li>– Educators Book Award</li> <li>– State newsletters/websites</li> <li>– DKG blogs</li> </ul>
An audience for visual and performing arts and	<ul style="list-style-type: none"> <li>– Arts &amp; Humanities Galleries</li> </ul>

*\*Indicates that not all state organizations and chapters have these opportunities.*




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### What do we do when we feel like our chapter is struggling and might not survive?

The first step is to have open and honest conversation about the challenges facing the chapter. Seek help from state organization officers. Your state organization president can assist you with the process of revitalization and must assist you with dissolution or merger in the event the chapter chooses such an option. Of course, the Society Headquarters membership staff can assist you as well.



### When Dissolution Appears to be the Only Option

If you feel your chapter is struggling to stay alive, call your state organization president immediately. She is available to assist you with strategies and ideas to strengthen your chapter. The state organization membership chair can also be your go-to person.

If your chapter has discussed all the options and feels that continuing as a chapter is too challenging, consider merging with another chapter nearby. Dissolution is, of course, an option but both require several critical steps. While Headquarters staff can assist you, with either option, your first step is to contact your state organization president. At that point, she will work with you on the next steps including requesting an executive board vote of approval. **Without the date of this vote and the date that the chapter bank account is closed, Headquarters cannot proceed with the dissolution or merger process.**

# Maintaining a Strong Chapter

## Green Flags Indicating a Healthy Chapter

- **Strong Leadership** – President and officers mentor chapter members to support leadership roles at the chapter, state and international levels
- **Positive Leadership** – President is enthusiastic and promotes member involvement. Encourages others to contact another member about meetings. Bring a friend to a meeting. Communication is strong within the chapter
- **Delegates** – President promotes team planning and ownership of activities and programs. Does not do all the work herself. Capitalizes on member strengths
- **Attendance** at chapter meetings is good – Meeting days/times vary throughout the year.
- **Members are reminded** via electronic communication to attend a meeting. Members who are unable to drive are offered a ride to the meeting
- **Member count** is greater than 20
- Majority of the members are **actively working**. **Retired members are active** in chapter programs and projects
- **State Organization Reports** are completed in a timely manner – Necrology, president’s report if required. Committee reports and other state-organization designed forms are completed and submitted within the designated deadline
- **Completes Form 990** with the IRS in a timely manner (only applicable to U.S. Chapters)
- **Knowledgeable of the Society** – New members participate in an orientation process
- **Engaged beyond the chapter** - Members attend state organization and international events
- **Society Membership Information is current** – Information shared with members and prospective members is up to date. Chapter yearbook contains accurate information about geographical guidelines, requirements of membership, qualifications for potential members, and information about state and international leadership. Bylaws and standing rules are current and revised when appropriate
- **Newsletter and/or website is informative** – published/updated regularly and contains Society and chapter information. Member information is always shared be it recognition of an accomplishment or personal news (birthday, promotion, family news). Pictures are included
- **Yearbook (if provided) is accurate** – Yearbook contains vital information from the chapter to international levels. Data regarding current officers at each level is evident. Programs are scheduled and explained
- **Programs reflect interests of members** – Programs are planned to include member interests and areas of expertise
- **Inspiration and Motivation** – President is enthusiastic at each meeting. Inspirational and motivational ideas are shared between members. These same thoughts are shared in the newsletter/website
- **Communication with state organization is evident** – President and members of the chapter respond to state organization leaders. State organization leaders are invited to attend chapter meetings and/or area events

## Questions to Guide a Group Discussion on Chapter Health

1. Does your chapter view itself a social club? A sorority? A professional organization? How would visitors view it?
2. How has your chapter been successful in collecting dues and communicating with members during this crucial time?
3. How has your chapter been successful in building leadership capacity of members?
4. How has your chapter been successful in meeting needs of members to feel a part of the group?
5. How has your chapter met the various programming needs of the chapter?
6. How has your chapter determined chapter projects?
7. How has your chapter been successful in streamlining business meetings?
8. There are structural and cultural aspects for chapter success. How do you feel your chapter has made progress in these areas? How has the culture of your chapter become more inclusive? How do you insure that all members are involved in structural decision-making?

## Supporting Early-career Educators (SEE)

**Why is DKG's support needed?** Education is a challenging career, and retaining quality teachers is an issue worldwide. In the U.S and many other countries around the world, educators are reportedly leaving the profession within the first 3 – 5 years of their entry.

Chapters rely on members who are active in the profession to identify outstanding educators who have given or have the potential to give distinctive service to education. However, as chapter members retire, opportunities to meet and identify prospective members decrease. Support for early-career educators gives the chapter new opportunities and venues for meeting and identifying prospective members.

Now that chapters can invite collegiate members, this focus on early-career educators gives chapters new ways to mentor; to provide financial assistance through mini-grants, gift cards, etc.; to volunteer in classrooms; and to work with student teachers who will become employed in the near future.

### Examples:

- Provide refreshments for new teachers in the system/district at a general meeting and give them the membership and marketing brochure with contact information
- Host a professional learning day and share chapter members' expertise in areas such as classroom management, lesson planning, and teaching strategies
- Assign members an early-career educator or collegiate member to "adopt" by offering support through phone calls, emails, social media, mentoring, and advice
- Grants-in-Aid funds can be used for early-career educator classroom grants or supplies
- Encourage educators in your community to apply for funding (Project Grants and Lucile Cornetet Professional Development Awards) from the DKG Educational Foundation

*For more information on how your chapter can implement this program, go to [www.dkg.org](http://www.dkg.org) and find resources under Projects.*

## Links and Resources

Access to most resources on the DKG Website ([www.dkg.org](http://www.dkg.org)) requires log in. Please call Society Headquarters or email [mem@dkg.org](mailto:mem@dkg.org) with any questions or for assistance.

### Logos and Copyright

Under Resources, see “Logos”

<https://www.dkg.org/DKGMember/Resources/Logos.aspx>

### Society Documents (governing and member handbook)

Under Resources, see “Society Documents”

[https://www.dkg.org/DKGMember/Resources/Society\\_Documents.aspx](https://www.dkg.org/DKGMember/Resources/Society_Documents.aspx)

### Chapter Tools

Visit your account under MyDKG and click on “Chapter Connect” or

Under Tools, see “Chapter Tools”

[https://www.dkg.org/DKGMember/Resources/Tools/Chapter\\_Tools.aspx](https://www.dkg.org/DKGMember/Resources/Tools/Chapter_Tools.aspx)

### Forms

Visit your account under MyDKG and click on “Chapter Connect” or

Under Forms, see the desired sub folder, such as “Contribution” or “Membership”

<https://www.dkg.org/DKGMember/Forms/DKGMember/Forms/Forms.aspx?hkey=f6c7a361-de25-4bb1-a424-ba0e6fa8ff2f>

### Ceremonies

Under Resources, visit “Ceremonies”

<https://www.dkg.org/DKGMember/Resources/Ceremonies.aspx>

### Applications

Under Apply/Submit, visit “Applications” or “Submissions”

[https://www.dkg.org/DKGMember/Apply\\_Submit/DKGMember/Apply\\_Submit/Application\\_Submission.aspx?hkey=007cf189-1f4e-4417-8efc-7ef6addfa2cb](https://www.dkg.org/DKGMember/Apply_Submit/DKGMember/Apply_Submit/Application_Submission.aspx?hkey=007cf189-1f4e-4417-8efc-7ef6addfa2cb)

## **International Projects**

Under Programs/Projects, visit “Schools for Africa” or “Supporting Early-career Educators”

[https://www.dkg.org/DKGMember/ProgramsProjects/DKGMember/Programs\\_Projects.aspx?hkey=8b620b64-49c1-4b54-a6ae-d88c931ce536](https://www.dkg.org/DKGMember/ProgramsProjects/DKGMember/Programs_Projects.aspx?hkey=8b620b64-49c1-4b54-a6ae-d88c931ce536)

## **Chapter Project Ideas**

Under Programs/Projects, visit “Project Spotlight” or “Program Ideas for Chapters”

[https://www.dkg.org/DKGMember/ProgramsProjects/DKGMember/Programs\\_Projects.aspx?hkey=8b620b64-49c1-4b54-a6ae-d88c931ce536](https://www.dkg.org/DKGMember/ProgramsProjects/DKGMember/Programs_Projects.aspx?hkey=8b620b64-49c1-4b54-a6ae-d88c931ce536)

## **Join a DKG Community**

Under My DKG, choose “ My Communities” in your account area

<https://www.dkg.org/DKGMember/MyDKG/DKGMember/ContactLayouts/AccountPage.aspx?hkey=1675fb8e-b788-4f84-a106-66833de0613e>

## **Register for an international convention or conference**

Under Events, choose the desired event

[https://www.dkg.org/DKGMember/Events/DKGMember/DKG\\_Events.aspx?hkey=4b445ed5-b80b-4cb2-a23d-14ba20b0bdaa](https://www.dkg.org/DKGMember/Events/DKGMember/DKG_Events.aspx?hkey=4b445ed5-b80b-4cb2-a23d-14ba20b0bdaa)

## **Order Supplies**

On the homepage, choose “Shop Now” on the “DKG Store” button

<https://www.dkg.org/store>

## **Make a Contribution**

On the homepage, choose “Learn More” on the “Donate to DKG” button

[https://www.dkg.org/DKGDONATE/DKGDONATE/Donate\\_to\\_DKG.aspx](https://www.dkg.org/DKGDONATE/DKGDONATE/Donate_to_DKG.aspx)

## **Access the DKG Educational Foundation website**

On the homepage, choose “Learn More” on the “DKG Educational Foundation” button

Or go to [www.dkgef.org](http://www.dkgef.org)