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**Handbook of The DKG  
Society International  
2023**

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12710 Research Blvd. Ste. 230  
Austin, TX 78759

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# Introduction

This Handbook is an official document of DKG, meaning it has gone through an approval process validating its accuracy. This publication is not a governing document. It provides a supplement to, not a substitute for, the Constitution and International Standing Rules. The topics are primarily arranged in the format of the Constitution. The reference list contains links to [www.dkg.org](http://www.dkg.org) governing documents, and other official publications of DKG. This Handbook is not intended to be all inclusive; if there is a need for more detail and specificity, refer to additional documents at [www.dkg.org](http://www.dkg.org). The Appendices provide documents or examples of documents which might be useful in doing the business of the chapter.

## 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*

## Anthem/Emblems/Symbols

The song composed by Dr. Annie Webb Blanton and Mrs. Cora Martin is the official anthem of The Delta Kappa Gamma Society International. Refer to [www.dkg.org](http://www.dkg.org) > Resources > Music.

DKG has adopted particular names and symbols to represent its Mission and Purposes. Refer to [www.dkg.org](http://www.dkg.org) > Resources > Logos.

Name – The Delta Kappa Gamma Society International may also be known as Delta Kappa Gamma, the Society, ΔΚΓ, or DKG. The name of DKG in any form shall not be used on printed materials for commercial purposes without the permission of the international president and the corporate secretary of DKG.

## **For Affiliated Groups and Social Media Sites (State Organizations, Chapters, Member Groups)**

### **Disclaimer (Eng)**

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### **Disclaimer (Spanish)**

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## **Seven Purposes**

To unite women educators of the world in a genuine spiritual fellowship

To honor women who have given or who evidence a potential for distinctive service in any field of education

To advance the professional interest and position of women in education

To initiate, endorse and support desirable legislation or other suitable endeavors in the interests of education and of women educators

To endow scholarships to aid outstanding women educators in pursuing graduate study and to grant fellowships to non-member women educators

To stimulate the personal and professional growth of members and to encourage their participation in appropriate programs of action

To inform the members of current economic, social, political and educational issues so that they may participate effectively in a world society

## **International Projects**

U.S. Fund for UNICEF's [www.unicefusa.org/dkg](http://www.unicefusa.org/dkg) (To be determined after 2024 International Convention.)

## Supporting Early-career Educators (SEE) International Project

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 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 International Educational Foundation.

## 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.2c)

8. Chapters must have at least four (4) regular meetings per year. (IX.A.1)

## Contacting Society Headquarters

Information and assistance may be obtained at any time by visiting the DKG website at [www.dkg.org](http://www.dkg.org) or by contacting Society Headquarters:

- Phone +1-512-478-5748
- Fax +1-512-478-3961
- Chat
  - Office Hours: 7:30 a.m. – 6:30 p.m. Central Time Monday – Friday

### 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 finance director at [societyoper@dkg.org](mailto:societyoper@dkg.org)
- 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



We are online  
[Click here to  
chat now](#)

## Founders of DKG

Nine years after women won the right to vote in the United States of America, DKG was founded to fill the needs of women in the educational profession. At that time, women teachers were offered few leadership positions, promoted rarely, fired easily, and paid less than male colleagues. Dr. Annie Webb Blanton, a university professor and a former Texas Superintendent of Education, dreamed of and planned for an organization in which women teachers could support one another and recognize themselves as leaders in a chosen profession. Blanton and eleven other women educators, representing different disciplines and under assumed names for fear of losing jobs, founded DKG on May 11, 1929. The Twelve Founders were Dr. Annie Webb Blanton, Miss Mamie Sue Bastian, Miss Ruby Cole, Miss Mabel Grizzard, Dr. Anna Hiss, Miss Ray King, Miss Sue King, Dr. Helen Koch, Mrs. Ruby Terrill Lomax, Dr. Cora M. Martin, Mrs. Lalla M. Odom, and Miss Lela Lee Williams.

From its beginning with 12 Texas women educators, DKG has grown into an international organization with chapters throughout 77 state organizations in 17 countries at the time this publication went to press. Chapters are the heart of DKG, and it is at the chapter level (local level) of DKG where a woman educator begins a membership journey. In order to retain members, a chapter must meet the needs of its members. To assist chapter members in understanding Society better, this publication was created.



*The best feature of Delta Kappa Gamma is the new friendships which it brings. I value yours.*

*Annie Webb Blanton*

FOUNDERS



# Membership

## Member Selection, Retention, and Opportunities

Membership in the Society is by invitation. Educators who meet membership qualifications may be invited to chapter functions so others may meet them and so they may learn more about the organization. Diversity in academic discipline, level of instruction, ethnicity, and instructional environment in membership expands individual perceptions. A Chapter Member Biographical Data Sheet (Form 82) can be found at [www.dkg.org](http://www.dkg.org) > Resources > Membership

An individual becomes a member when dues are paid and induction is not required.

Research indicates that a successful chapter

1. uses its chapter survey information when making membership decisions;
2. invites prospective members to attend meetings;
3. conducts orientation of prospective members and reorientation of members;
4. keeps in touch with members who miss meetings;
5. maintains an up-to-date file of chapter members' biographical data;
6. reports the death of each member (Form 6) [www.dkg.org](http://www.dkg.org) > Resources > Membership; and
7. conducts tributes and memorials for deceased members.

## Membership Classifications and Eligibility

Membership classifications in the Society are active, reserve, collegiate, or honorary.

**Active –**

1. An active member is a woman who is or has been employed as a professional educator at the time of election.
2. In the selection of a member, the definition of professional educator is interpreted to include one-to-one instruction as well as group instruction.
3. The chapter decides if the prospective member is classified as a professional educator.
4. A woman who is not presently employed as a professional educator but who left the profession before retirement is eligible for invitation to active membership.
5. The word employed is defined as currently hired by an employer and/or paid a salary or fee for specific educational services.
6. Certification or licensure is not required.
7. A professional educator may be invited to membership regardless of geographic address or is employed unless a restriction is included in state organization bylaws.
8. An active member participates, as able, in chapter programs and projects, contributes to committee work, votes, shares in financing chapter activities and may hold office.
9. A member retired from educational work retains the rights and privileges of active membership.
10. An active member is not eligible to become an honorary member.
11. Attendance at meetings is not required.

**Reserve-**

1. Reserve membership shall be granted only to a member who is unable to participate fully in the activities of the chapter because of medical disability and/or geographic location and no technological connections/skills.
2. Reserve members have all the privileges of membership except that of holding office and have no obligations except payment of dues and the scholarship fee.
3. Retirement is not a reason for granting reserve membership.
4. Being too busy to attend meetings is not a reason for granting reserve membership.
5. Reserve status is granted by a majority vote of the chapter.
6. A reserve member, so requesting, shall be restored to active membership.

**Collegiate –**

1. Collegiate membership shall be granted to undergraduate or graduate students who meet the following criteria:

**Bachelor Student Collegiate Members:**

1. Be enrolled in an institution in coursework leading to a career in education and have the intent to continue academically and professionally in the field of education; and
2. Be enrolled within the last two years of her bachelor education degree.

**Graduate/Masters/Doctoral Collegiate Members:**

1. Have Graduate/Masters/Doctoral standing in an institution offering course work in the field of education.
2. Have the intent to continue academically and professionally in the field of education.

**Chapter or State Organization Honorary –** A member shall be a woman not eligible for active membership who has rendered notable service to education or to women, and is elected to honorary membership in recognition of such service. Honorary membership can be granted at the chapter, state organization, or international level.

1. Honorary members may participate in all activities except that of holding office.
2. Chapter honorary members are elected in accordance with chapter rules. The Recommendation for Membership (Form 11) [www.dkg.org](http://www.dkg.org) > Resources > Membership.
3. Each chapter honorary member is presented with an honorary membership certificate. Members may be given a key pin.
4. A former educator is eligible for active, not honorary, membership.
5. An honorary member may not be inducted in absentia.
6. An honorary member may serve as parliamentarian.
7. No annual dues or fees are paid to the chapter, state organization, or the international level.
8. An honorary member who becomes a professional educator and thus eligible for active membership accepts the obligations, responsibilities, and honor of membership at all three levels, including appropriate dues and fees. (Article III B. 3.

## **Reinstatement**

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.

## **Termination**

Membership is terminated for non-payment of dues and fees, resignation, or death. The chapter treasurer completes the Report of Members Dropped (Form 18A) [www.dkg.org](http://www.dkg.org) > Resources > Treasurer > Forms. The chapter is encouraged to contact the member terminating membership by resigning or non-payment of dues to discuss alternatives and determine the reasons for dropping membership. When a member dies, the chapter president sends Form 6 to Society Headquarters at the time of the member's death and the president or designee completes an annual necrology report (Form 2) by February 1. If requested by the state organization, Form 2 can be found at [www.dkg.org](http://www.dkg.org) > Resources > Treasurer.

## **Transfer Process**

1. A member in good standing may transfer from one chapter to another upon notifying Society Headquarters.
2. The chapter treasurer should transfer the member into the new chapter via the dues portal upon request.
3. If a request is received at Society Headquarters, staff may send 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.
4. The receiving chapter does not vote on the transfer.
5. A member who moves to another area and who wishes to be active in the local chapter but retain membership in original chapter (not transferring to the local chapter) may attend meetings of the local chapter, state organization, and region; at present, there is no circumstance where a member may have membership in more than one chapter simultaneously.

## **Membership Committee**

Duties of Chapter Membership Committee Chair and Committee

1. Membership Chair works with the chapter to encourage recruitment, retention and reinstatement of members. Refer to [www.dkg.org](http://www.dkg.org) Resources > Membership for suggested strategies.
2. Prepare the Necrology Report (Form 2) [www.dkg.org](http://www.dkg.org) Resources > Treasurer if there is no chapter necrology committee. This report is due February 1 of each year if your state organization requires.

## **Membership Resources**

Materials and resources are available for download at the DKG website [www.dkg.org](http://www.dkg.org) Resources > Membership.

## 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 –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, earthquakes, or other catastrophic event of nature	<ul style="list-style-type: none"> <li>– International Emergency Fund, \$500 per event</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/province/country/world	<ul style="list-style-type: none"> <li>– International Schools for Africa 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>

MEMBERSHIP

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

# Finance

## 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 who join on or after January 1 pay 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 fees are paid to International.

Honorary member whose status is changed to active membership pays dues and fees as specified. The member is not inducted again.

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 DKG website at [www.dkg.org](http://www.dkg.org) > MyDKG > My Account > Dues Portal.

## Dues Collection Timelines

- March 1 - Dues portal closes for the current membership year. Chapters should ensure all current members have had orders created in the dues portal prior to this date.
- 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 portions).
- 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. Members who have been dropped can be reinstated in the dues portal once current dues have been paid to the chapter treasurer.

**Assessments** - Only chapters may assess active members. Reserve members may be exempt from paying an assessment fee. Chapters have control of assessments.

**DKG has no reinstatement fee.** Reinstated members pay full dues and fees in accordance with the above schedule. All reinstated members pay full dues upon reinstatement at any time.

## Managing new members and member status

Presidents, membership chairs and treasurers should work together to ensure 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.

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

In addition, the president, treasurer, and membership chair should work together to encourage all members to renew membership each year. Developing strategies that assist members who encounter financial challenges regarding 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 July. 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. A request may also be to 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) > Resources > Treasurer > Forms for both mail and email.

## Beginning the fiscal year

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

1. Accounting and membership documents
  - a. Access to MyDKG through the society website at [www.dkg.org](http://www.dkg.org)
  - b. Treasurer/membership documents located under the Resources tab.
  - c. Treasurer's accounting software – Excel or QuickBooks is recommended.
2. Maintain the chapter's files, as detailed in the Suggested Retention Schedule.

## Retention Schedule

Type of Record	Legal Period
Bank Deposit Slips/Copies of Cancelled Checks	7 years
Bank Statements/Reconciliations	7 years
General Ledger/Journal	Permanent
Authorization & Appropriation for Expenditures	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: Dues Orders	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 Applications	3 years
Employee Files	7 years after employment ends
State Organization Convention Financial Records	7 Years
Contracts	10 years from termination
Insurance Policies	Permanent
Leases	10 years from termination
Real Estate Purchases	20 years after sale
Annual Reports	Permanent
Articles of Incorporation	Permanent
Constitution/ Bylaws/Rules	Current
Type of Record	Legal Period
Bank Deposit Slips/Copies of Canceled Checks	7 years
Minutes	Permanent
Keep State Organization/Chapter records of archival value permanently. For long term storage DKG recommends that hard copies be kept in addition to electronic data.	

### Bank Accounts

- All chapter money shall be deposited in an account in the name of (Name) Chapter.
- The chapter president and the chapter treasurer are required signers on all financial accounts for the chapter. This needs to be updated if there is a change.

### Treasurer 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. **Never deposit chapter money into a personal bank account.**

1. Give a financial report at each meeting during the year.
  - Include 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.
2. 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.
  3. Annual filing
    - Complete and submit 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 990N filing to the state organization treasurer. The link to file these forms is available under Chapter Connect in MyDKG and available on the website under Resources > Treasurer.
  4. Reinstatement of Members
    - 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).

## 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 DKG International Educators Foundation, 12710 Research Blvd. Ste.230, Austin TX 78759.
- Credit card contributions may be made through the online contribution form on the Society website at [www.dkg.org](http://www.dkg.org) > DKGIEF > Ways to Contribute.

## 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 the 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 DKGIEF International Educators Foundation (DKGIEF)

Contributions to the DKG International Educators Foundation a 501(c)(3) are tax deductible to the fullest extent of the law in the U.S. and some other countries. These areas include Cornetet, Educational Projects, Educators Book Award, Emergency Fund, DKG Ignite, 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**

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

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

## **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 DKG International Educators 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. 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 organization 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 Finance 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 reported on Form 87 which can be

found on the DKG website. Each unit of DKG 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 from the IRS regarding 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 990 n electronically between July 1 and November 15 of each year. The filing of the Form 990 or 990 n 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 990 n 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. Contact the Finance Director at Society Headquarters at +1-512-478-5748 if you have any issues with filing.

The fiscal year on the report should be July 1 to June 30. If the fiscal year is incorrect, email [societyoper@dkg.org](mailto:societyoper@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 possible. 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 990 n 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.

### **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.

### **All member countries**

#### **Financial Audits**

The members of the Financial Review Committee are the examiners of accounts (sometimes referred to as the Audit Committee) 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. Fiscal year begins July 1 and ends June 30. Financial audits are permanent records and are never destroyed.

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

1. 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 amount was collected for each type of membership.
4. Proper distribution was made for each type of membership fee and recorded.
5. Correct amounts were sent promptly to the DKG Headquarters/state organization treasurer for international and/or state organization dues and fees.
6. Bank statements were properly reconciled each month with the book balance and the checkbook balance.
7. The total amount of checks written equaled the total amount of expenditures recorded on the books.
8. 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.
9. All expenditures are approved by the president supported by documentation.
10. All directives and limitations regarding finances, as recorded in the minutes of the organization, were followed.
11. Special contributions were received and/or disbursed in accordance with their intended purpose.
12. All fund transfers were made in a timely manner.
13. State organization Investment Policy is current.
14. 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
  - f. correct amount of investment income recorded at time earned.

# Sample Budget Worksheet

Chapter \_\_\_\_\_

20\_\_\_\_ - 20\_\_\_\_

## Revenue

Balance brought forward July 1, \_\_\_\_\_ \$ \_\_\_\_\_

### Estimated Receipts

#### Dues

International \_\_\_\_\_ @ \$40 (Active) \$ \_\_\_\_\_  
 \_\_\_\_\_ @ \$20 (Reserve) \_\_\_\_\_  
 \_\_\_\_\_ @ \$20 (Collegiate) \_\_\_\_\_

State \_\_\_\_\_ @ \_\_\_\_\_ (A) \_\_\_\_\_  
 \_\_\_\_\_ @ \_\_\_\_\_ (R) \_\_\_\_\_  
 \_\_\_\_\_ @ \_\_\_\_\_ (C) \_\_\_\_\_

Chapter \_\_\_\_\_ @ \_\_\_\_\_ (A) \_\_\_\_\_  
 \_\_\_\_\_ @ \_\_\_\_\_ (R) \_\_\_\_\_  
 \_\_\_\_\_ @ \_\_\_\_\_ (C) \_\_\_\_\_

Scholarship Fee \_\_\_\_\_ @ \$1.00 \_\_\_\_\_

Chapter Assessments \_\_\_\_\_ @ \_\_\_\_\_

Interest Income \_\_\_\_\_

Other \_\_\_\_\_

Total Estimated Receipts \_\_\_\_\_ \$ \_\_\_\_\_

Total Amount Available for Budget  
 (Balance Brought Forward + Receipts) \_\_\_\_\_ \$ \_\_\_\_\_

# Sample Budget Worksheet (Example)

## Expenditures

### Estimated Expenses

#### Dues

International \_\_\_\_\_ @ \$40 (Active) \$ \_\_\_\_\_  
 \_\_\_\_\_ @ \$20 (Reserve) \_\_\_\_\_  
 \_\_\_\_\_ @ \$20 (Collegiate) \_\_\_\_\_  
 State \_\_\_\_\_ @ \_\_\_\_\_ (A) \_\_\_\_\_  
 \_\_\_\_\_ @ \_\_\_\_\_ (R) \_\_\_\_\_  
 \_\_\_\_\_ @ \_\_\_\_\_ (C) \_\_\_\_\_

Scholarship Fee \_\_\_\_\_

Total Dues and Fees \_\_\_\_\_ \$ \_\_\_\_\_

#### President's expenses

Conventions, workshops  
 Miscellaneous \_\_\_\_\_

#### Meeting expenses

Induction expenses \_\_\_\_\_  
 Stationery and supplies \_\_\_\_\_  
 Chapter yearbook \_\_\_\_\_  
 Postage \_\_\_\_\_

#### Contributions

International Funds \_\_\_\_\_  
 State Funds \_\_\_\_\_

#### Special Projects

Gifts and flowers \_\_\_\_\_  
 Miscellaneous \_\_\_\_\_  
 Other \_\_\_\_\_

Total Chapter Operating Expenses \_\_\_\_\_ \$ \_\_\_\_\_

Total Estimated Expenses \_\_\_\_\_ \$ \_\_\_\_\_

Estimated Balance June 30, 20\_\_\_\_ \$ \_\_\_\_\_

# FINANCE

**Income** - The Work of the Society is supported primarily by membership dues and fees. Additional income may be derived from contributions, bequests, sale of items, royalties, and vendor fees. A chapter also may vote to levy an assessment on its active members.

## **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. Many state organizations and chapters have developed sale items to support activities congruent with the purposes and projects of The Delta Kappa Gamma Society.

## **Guidelines**

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 is a not-for-profit organization classified under Section 501(c)(6) of the U. S. International 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. Sale of items by vendors should be scheduled at times other than Society general sessions or business meetings.

1. Items should be of high quality, reflecting the professional image of the Society.
2. The Society key should not be used on items designed for sale by members, chapters, state organizations, and any other vendors.
3. Items may be advertised in state organization or chapter newsletters or brochures, consistent with postal regulations.
4. 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.
5. Written permission must be obtained for any materials protected by copyright.
6. The Delta Kappa Gamma Society International has adopted the following governing rules pertaining to the sale of items:
  - a. Constitution, Article X, Section A. International Conventions and Conferences 3. On-Site Sales
7. A state organization or chapter desiring to sell items at conventions and conferences shall follow the international guidelines for sale of items.
8. 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.

*Submitted by Non-Dues Revenue Committee 2019*

*Approved by the Administrative Board May 2020*

*Updates recommended by the 2020-2022 International Non-dues Revenue Committee 2/5/2021*

*Approved by Administrative Board - May 2021.*

### **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 international website at [www.dkg.org](http://www.dkg.org). Chapters may decide to purchase jewelry for members as an accessory item but it is not mandatory for members. A separate order form for paraphernalia is used to order the induction materials from Awards Concepts, Inc. [www.dkg.org/store](http://www.dkg.org/store).

### **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 the IRS Form 990 (only in the U.S.)
- The fiscal year of DKG begins July 1 and ends June 30.

# Organization

## Chapter Structure

Each active, reserve and collegiate member belongs to International and a state organization and may maintain membership in a chapter. The term state organization designates states, territories, provinces, countries, or comparable political divisions of countries where DKG is organized. State organization boundaries coincide in some instances with national boundaries. The terms International and/or Society refer to the overall organization.

A chapter is governed by the *Constitution* and *International Standing Rules*, the state organization bylaws/standing rules, the chapter rules, and the designated parliamentary manual. A chapter adopts and recognizes in its chapter rules the parliamentary manual adopted by the state organization. No chapter rule or practice shall be in conflict with international or state organization governing documents. A state organization, as a political entity, may be required to have a Corporate Charter. If a Corporate Charter exists, it takes precedence over all other Society governing documents. Each voting member of an assembly is entitled to one (1) vote. Proxy voting is not an acceptable practice.

A chapter has full authority for:

1. administration of membership
2. management of chapter funds; decisions related to assessments and the amount of chapter dues
3. the addition of a second vice president and/or corresponding secretary to its elected officers
4. choice of standing committees or an alternate structure to carry out constitutional responsibilities
5. choice of number of chapter meetings above the four required business meetings
6. the determination of the number necessary for a quorum
7. inclusion.

## Rules

Chapter Rules serve as a guide for chapter operations and procedures within the framework of the DKG *Constitution* and *International Standing Rules* and the respective state organization governing documents which include such items as dues, number of programs and projects each year. Chapter rules are to be consistent with the *Constitution* and *International Standing Rules*, state organization bylaws and parliamentary authority. Chapter rules are to be submitted to the state organization for review.

## Coordinating Councils (optional)

Coordinating councils may be organized in areas in which several chapters exist. The purpose of a coordinating council is to coordinate the planning, scheduling, and implementation of activities, projects, and procedures of joint concern to chapters.

If an area/city or several chapters decide to have a coordinating council and a chapter desires to participate, the president and one other member serve on the council. Coordinating councils organized in the United States and establishing a bank account with a separate employer identification number (EIN) should report that number to Society Headquarters and file a Form 990 yearly.

### **Executive Board**

The members of the executive board are the elected officers of the chapter, immediate past-president, and such other voting members as determined by the chapter. The treasurer and parliamentarian are ex-officio members; the parliamentarian without vote and the treasurer without vote if paid for services.

1. A chapter executive board shall meet at least twice each year.
2. The executive board selects the treasurer for the biennium.
3. Acts in matters requiring immediate action and decision.
4. Recommends policies and procedures for consideration by members.
5. Establishes rules for budget development and approval and for the supervision of chapter finance.

### **Meetings**

- A chapter shall hold at least four (4) regular meetings each year. Additional meetings may be held if desired.
- Electronic meetings may be held if all members can actively participate.

### **Merger/Consolidation and Dissolution**

Contact the state organization president before taking any action. The process for chapter dissolution is delineated in the state organization bylaws.

The process for merging or consolidating chapters should follow Robert's Rules Newly Revised (current edition) or other recognized manual of parliamentary procedure adopted by the state organization and its chapters.

- Funds of dissolved chapters are sent to the state organization treasurer and deposited in the state organization's available fund.
- Funds of merged or consolidated chapters remain with the chapter.
- The state organization decides whether to reuse the name of a dissolved chapter.
- File appropriate 990 forms IRS US only.

Send names and contact information of any officers to the state organization president and DKG Headquarters (Form 110).



## Officers

### Officers

1. An officer must be an active member of DKG.
2. A chapter should have at least four officers: a president, a vice president, a secretary, and a treasurer.
3. A chapter may choose to have a second vice president and/or a corresponding secretary.
4. Chapter co-presidents are not advised. Only one name may be submitted to Society Headquarters for communication purposes.
5. Officers, except the treasurer, are elected in even-numbered years.
6. The chapter treasurer is selected by the chapter executive board each biennium.
7. The term of each elected officer shall be two (2) years or until a successor is named.
8. No officer, except the treasurer, may serve in the same office longer than two (2) terms in succession.
9. The term for chapter officers begins July 1 following election or selection.
10. The chapter parliamentarian is appointed by the president and may serve more than two (2) consecutive terms.
11. It is desired that the parliamentarian be a member of the chapter.

### Officers and Related Personnel Duties

#### Chapter president

1. Become familiar with the president's duties, the procedures and work of DKG, and the business of the chapter.
2. Attend leadership training.
3. Act as presiding officer at regular and called meetings and direct the activities of the chapter.
4. Serve as chair of the chapter executive board and as a member of the state executive board.
5. Represent the chapter at state organization meetings, workshops, international meetings, conventions, and coordinating councils-if applicable.
6. Appoint standing and special committees and a parliamentarian for the biennium.
7. Act, with the advice and approval of the executive board, on matters which cannot be deferred until the next meeting.
8. Work with the chapter to plan activities for the year that develop the leadership potential of its members.
9. Ensure the chapter has a plan for strategic growth and development.
10. Ensure chapter rules are up to date and in alignment with state organization bylaws and International Constitution.
11. Approve for payment all expense claims and publications.
12. Serve as ex-officio in the supervision of finances and budget development.
13. Notify the state organization and local banks of changes in officers during the biennium.
14. Fill by appointment all vacancies in the office.
15. Ensure that new membership kits have been ordered.
16. Ensure that recognition is given to any chapter member who is serving as

a state organization or international officer, committee chair, or committee member.

17. Complete forms when requested by state organization or international.
18. Work with the membership chair and the treasurer to contact each member who has not paid dues before the member is dropped for non-payment of dues.
19. Contact the state president for a scheduled list of reports and deadlines.
20. A chapter president assumes responsibility for encouraging chapter activities that develop the leadership potential of each chapter member. Each chapter and state organization is responsible for the work of some international committees: Communications and Marketing, Educational Excellence, Finance, Membership and Expansion, Scholarship, and World Fellowship. Committee names and number of committees at the state organization and chapter level may or may not be the same as international or state organization committees; but required work, as applicable, is to be carried out as indicated in the *Constitution*, Article VIII. Chapters make decisions on committee names, and the work of those committees. Reports of the work of chapters are prepared on forms supplied by DKG and submitted to the persons designated on the forms. The President is an ex-officio member of all committees except the Nominating Committee if this statement appears in the chapter rules. As an ex-officio member, the President has a vote:

### **Documents and publications for president's file**

1. Current *Constitution* and *International Standing Rules*
2. Current Handbook of The DKG Society International. Download the latest version from [www.dkg.org](http://www.dkg.org) >Publications > Handbook.
3. State organization bylaws and standing rules
4. Chapter rules
5. Chapter charter
6. Official Inductee Register

### **Vice President/Membership Chair**

1. Performs those duties assigned by the president and/or the executive board.
2. Acts in place of the president when the need arises.
3. Becomes the president in the event of the death or resignation of the president and serves until the next regular election of officers.

### **Secretary**

1. Maintains written records for chapter files.
2. Records the minutes of each chapter and executive board meeting, including any membership terminations with reasons for termination, and other official actions taken.
3. Makes available to members the minutes of the previous meeting.
4. Files official minutes in a permanent chapter file after indicating the date that minutes are approved with signature/initials.

### **Treasurer**

1. Receive and pay out all monies belonging to the organization.

# OFFICERS

2. Keep an accurate account of receipts and expenditures.
3. Maintain a record of receipts, bills and bank statements.
4. Present a report at each regular meeting.
5. File required tax reports.
6. Submit for annual audit/financial review the accounts of the organization.
7. Serve as a member, ex officio, without vote if under remunerative contract for services, on the respective executive board.
8. Serve as a consultant in the process of budget development and supervision of finances.
9. Maintain an accurate and current membership roster.
10. Submit Change of Treasurer form ( Form 87 [www.dkg.org](http://www.dkg.org) > Resources > Treasurer) to State Organization Treasurer and International ([mem@dkg.org](mailto:mem@dkg.org)).

Note: Upon receipt of Form 87 International will issue credentials to the new treasurer for access to the dues portal. For US treasurers (only) International will notify the IRS.

### **Parliamentarian**

1. Advises the officers and members in matters pertaining to interpretation of the *Constitution* and *International Standing Rules*, state organization bylaws, chapter rules, and parliamentary procedure.
2. Gives advice or explanation only when requested to do so.
3. Is not an officer, but is a non-voting member of the executive board.
4. It is desired that the appointed parliamentarian be a member.

### **Order of Business for state organization or chapter meetings**

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 Agenda for Chapter Meetings**

1. Call to Order by the Chair stating that the meeting will come to order.
2. Opening Ceremonies (Optional).
3. Introduction of Guests (if any).
4. Roll Call (Optional).
5. Approval of 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.
6. Reports of Officers (Who have reports to give). If the Executive Committee has a report it is read by the Secretary.

7. Report of Treasurer.
8. Reports of Standing Committees.
9. Reports of Special Committees: The same rules apply as for standing committees.
10. Special Orders: This includes any postponed item which was made a special order for this meeting. Also includes action required by Chapter rules ie: Election of Officers.
11. Unfinished Business (if any) ie. motions not dealt with at the previous meeting.
12. 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.
13. Announcements.
14. Program: A program may be scheduled anytime during the meeting preferably before or after discussing business.
15. Adjournment: When there is no additional business, the Chair may declare the meeting adjourned.

### **Introductions for state organization or chapter meetings**

The presiding officer or designee introduces or presents those seated at the head table and guests present.

1. Persons who are not members or who are unknown to the group are introduced.
2. Persons who are known to the group are presented.

### **Opening Ceremonies**

Check the protocol of the country in which a meeting is being held and the state organization's parliamentary authority to determine proper order of activities that formally open a large meeting of an assembly. In the United States of America, the order of presentation would typically be an invocation, the national anthem, and the Pledge of Allegiance to the Flag of the United States of America. An inspiration, if desired, would follow.

### **Activities That May Have Religious Connotations**

The Society has no religious affiliation and invites members of all faiths and denominations. Members are reminded that inspirations, collects, invocations, etc. should not include any identifiable religious reference. Members are reminded that identifiable religious books or items should not be displayed unless all religions are represented.

### **Scholarships, Grants, and Awards**

A chapter may retain part of the scholarship fee paid by each member if it has a chapter scholarship fund, separate from the chapter available fund, designated for scholarships for members. A chapter may give a grant (grant-in-aid) to a member/non-member. The name of a grant-in-aid is the choice of the chapter. A chapter has the responsibility to:

1. Establish criteria and select recipients for chapter grant-in-aid awards and/or

- chapter scholarships;
- 2. Ensure funds are used only for scholarships for members;
- 3. Promote chapter or state organization grant-in-aid awards for members/non-members;
- 4. Publicize chapter, state organization, and international scholarship and grant deadlines.

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

1. Providing support and fellowship to members: develop carpools, recognize members at each meeting.
2. Presenting interesting, informative, comprehensive orientation and reorientation sessions.
3. Developing diverse programs to engage all members.
4. Involving members in programs.
5. Improving communications. Is your newsletter effective?
6. Optimally, the chapter has 20 or more involved and participating members.
7. Not more than 10 percent of the chapter members are reserve members.
8. New members are inducted each year.
9. Orientation programs are held for prospective members.
10. Reorientations are presented each biennium for all members.
11. There is good attendance at all chapter meetings.
12. Programs have professional substance and are related to the Delta Kappa Gamma Purposes and Mission.
13. All members participate in a variety of ways.
14. Executive Board meetings are held regularly (a minimum of 4 each biennium).
15. Members attend council, area, state organization, international functions.
16. Funds are budgeted to assist the president's attendance at council, area, state organization, international functions.
17. Members are enthusiastic about Delta Kappa Gamma.
18. Members are willing to serve as officers and committee chairs.
19. Written, electronic and telephone communications are excellent.
20. Reports and requested documents are submitted on time.
21. For more information go to [www.dkg.org](http://www.dkg.org) Resources > Membership > Chapter Strengthening.

## **Chapter Rules Checklist**

Chapter president should check with the state organization to determine if there is a Chapter Rules Checklist in place.

## Cross Reference Between Constitution and International Standing Rules

Topic	<i>Constitution - C</i>	<i>International Standing Rules - ISR</i>
Affiliates	C Article XIV	ISR 14
Amendments	C Article XVI	—
Awards	C Article XIII	ISR 13
Boards	C Article VII	ISR 7
Committees	C Article VIII	ISR 8
Conflict of Interest	C Article XVIII	—
Dissolution	C Article XIX	—
Finance	C Article IV	ISR 4
Indemnification	C Article XVII	—
International Conventon/ Regional Conferences	C Article X	ISR 10
Meetings	C Article IX	ISR 9
Membership	C Article III	ISR 3
Mission and Purposes	C Article II	—
Name and Emblems	C Article I	ISR 1
Officers	C Article VI	ISR 6
Organization	C Article V	ISR 5
Parliamentary Authority	C Article XV	—
Publications	C Article XII	ISR 12
Society Headquarters	C Article XI	ISR 11
The Delta Kappa Gamma Society Educational Foundation	C Article XX	—

**Legend: C = Constitution    ISR= International Standing Rules**

OFFICERS

## MERGER AND CONSOLIDATION

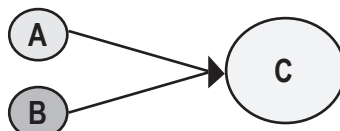
### Combining of Chapters

*Robert's Rules of Order Newly Revised 12th Edition.* In cases where two existing societies wish to combine, there are two possible procedures, which are legally distinct.



1a. A is absorbed into B. (B Bylaws govern)

1b. B is absorbed into A. (A Bylaws govern)



2. A and B both discontinue their separate existence in order to come together in a new organization. Bylaws to govern C must be developed and adopted.  
[Called Consolidation]

	Merger	Consolidation
Definition	One of the two organizations continues, while the other loses its independent identity and *ceases to exist, since it is merged – that is, absorbed – into the former.	Two or more organizations each discontinue its independent existence, and a new entity is formed that includes the memberships of the consolidating organizations, continues their work, and assumes their assets and liabilities.
Name	The resulting organization may be given a new name.	The resulting organization may be given a new name.
Incorporated	Consult an attorney to draw up the proper papers and advise as to all steps necessary to fulfill the legal arrangement.	Consult an attorney to draw up the proper papers and advise as to all steps necessary to fulfill the legal arrangement.
Unincorporated	<p>The organization that is giving up its independent identity should adopt a resolution substantially as follows:</p> <ul style="list-style-type: none"> <li>• “Resolved, That the <u>  A  </u> Society be, and hereby is, merged into the <u>  B  </u> Society as of [date] or when such merger shall be accepted by the <u>  B  </u> Society.”</li> <li>• For its adoption, such a resolution requires the same notice and vote as for amending the bylaws.</li> </ul>	<p>The two or more consolidating organizations adopt resolutions authorizing the consolidation, similar to the resolutions described in the item relating to merger.</p> <ul style="list-style-type: none"> <li>• Often – but not necessarily – these meetings are held simultaneously in the same building.</li> <li>• The resolutions containing details relating to the mechanics of transition are usually drafted by a joint committee.</li> </ul>

Cont...	Merger	Consolidation
	<ul style="list-style-type: none"> <li>• This resolution should be joined with, or its adoption should be followed by the adoption of, resolutions transferring all of the assets and liabilities to the chapter into which it is merging, and providing for whatever other administrative details will be required in the mechanics of transition.</li> <li>• The society into which the first organization is being merged should adopt a resolution accepting the merger, and this motion similarly requires the same notice and vote as to amend the accepting organization's bylaws, because it so greatly alters the per-capita interest of each member.</li> <li>• Often, resolutions authorizing and approving mergers contain stipulations and qualifications, sometimes even to the extent of naming the officers who will serve during the first year after the merger.</li> </ul> <p>Usually these resolutions are the work of a joint committee of the two organizations and form a part of its recommendations.</p>	<ul style="list-style-type: none"> <li>• After the consolidating organizations have each adopted resolutions which are substantially identical and which provide for consolidation as of a stated date, a joint meeting of the members of the consolidating groups is held for the purpose of organizing the new society that is to emerge.</li> <li>• A new set of bylaws must be drawn up and adopted. The procedure is similar to that for the original establishment of a society except that the necessary resolutions and motions normally are worded so that the date on which the new organization is established, its bylaws take effect, and its officers assume office coincides with the date on which the consolidating groups discontinue separate existence.</li> </ul>

\*"Ceases to exist" (an outcome) is not synonymous with "Dissolution" (a process) January 2009



## Parliamentary Procedures

### Ranking Motions

To handle a motion in Robert's Rules of Order, you need to follow these steps:

1. A member rises or raises a hand to signal the chairperson.
2. Another member seconds the motion.
3. The chairperson restates the motion.
4. The members debate the motion.
5. The chairperson restates the motion, and then first asks for affirmative votes, and then negative votes.
6. The chairperson announces the result of the vote and any instructions.

### Some basic rules for using motions in Robert's Rules of Order:

- Positive (action) motions are permitted, not negative.
- Only one person should speak at a time.
- You cannot raise another motion until all other motions are settled or adjourned – one motion must be discussed at a time.
- All members have equal rights to be heard when discussing a motion.

### Process for amending a motion is as follows:

1. Obtain the floor and obtain recognition from the chair.
2. Make a motion to amend the motion under consideration.
3. The motion to amend must be seconded.
4. The chair states the motion to amend.
5. Debate on the motion to amend begins.
6. A vote is taken on the motion to amend.
7. If the motion to amend passes, the main motion is amended accordingly.
8. The amended motion is then voted on.
9. It's important to note that an amendment must be relevant or germane to the motion it seeks to amend. Additionally, an amendment that does nothing but make the motion a rejection of the original motion is not proper and not in order\*\*—An incidental main motion which usually requires a majority vote with previous notice, a 2/3 vote without previous notice, or a majority of the entire membership.
10. Before a motion has been stated by the chair, it can be withdrawn or modified by the maker.
11. After being stated by the chair, it can be withdrawn or modified only by unanimous consent or a majority vote of the assembly.
12. Hasty or ill-advised action can be corrected through the motion to reconsider. This motion can be made only by one who voted on the prevailing side and can be made only on the same day the original vote was taken. In a session of more than one day, a reconsideration can also be moved on the next succeeding day within the session on which a business meeting is held.

### Pertinent Facts

A **main motion** brings business before the assembly.

A **subsidiary motion** assists the assembly in treating or disposing of a main motion

and sometimes of other motions.

A **privileged motion** deals with special matters of immediate importance. It does not relate to the pending business. An **incidental motion** is related to the parliamentary situation in such a way that it must be decided before business can proceed.

### Forms of Voting

A **voice vote** is the most commonly used form of voting.

A **rising vote** is the normal method of voting on motions requiring a two-thirds vote for adoption. It is also used to verify a voice vote or a vote by show of hands. The chair can order a rising vote or a single member can call for a division of the assembly.

A **show of hands** is an alternative for a voice vote, sometimes used in small boards, committees, or very small assemblies or for a rising vote in very small assemblies if no member objects.

A **count** can be ordered by the chair or by a majority vote of the assembly.

**Unanimous consent** is a vote of silent agreement without a single objection.

A **ballot or roll call** vote can be ordered by a majority.

Rulings of the chair can be appealed motions of higher rank than themselves.

### Meaning of Symbols

Motions are listed in the order of precedence, with the chair, higher ranking motions are in order but not lower

- A – Can be amended. highest ranking at the top. After a motion has been stated by
- D – Is debatable.
- I – Is in order when another has the floor.
- M – Requires a majority vote (i.e., more than half the votes cast).
- R – The vote on this motion may be reconsidered.
- S – Requires a second.
- $\frac{2}{3}$  – Requires  $\frac{2}{3}$  vote (i.e., at least twice as many in the affirmative as in the negative.)
- + – Usually no vote is taken. The chair decides.
- # – A main motion when no other motion is pending
- – No vote is taken. The chair responds.
- \* – See *Robert's Rules of Order Newly Revised*.
- \*\* – An incidental main motion which usually requires a majority vote with previous notice, a  $\frac{2}{3}$  vote without previous notice, or a majority of entire membership.

Ranking motions, except that Amend and Previous Question can be applied to amendable and/or debatable motions of higher rank than themselves.	Interrupt	Second	Debate	Amend	Vote	Reconsider
<b>Privileged Motions</b>						
# Fix the time to Which to Adjourn		S		A	M	R
* Adjourn		S			M	
# Recess		S		A	M	
Raise a Question of Privilege	I				+	
Call for the Orders of the day	I				+	

Subsidiary Motions						
Lay on the Table		S			M	R*
Previous Question (close debate)		S			$\frac{2}{3}$	R*
# Limit of Extend Limits of Debate		S		A	$\frac{2}{3}$	R*
# Postpone to a Certain Time (or Definitely)		S	D	A	M	R*
# Commit or Refer		S	D	A	M	R*
# Amend		S	D	A*	M	R
# Postpone Indefinitely		S	D		M	R*
Main Motion		S	D	A	M	R

Non-Ranking Motions	Interrupt	Second	Debate	Amend	Vote	Reconsider
Incidental Motions						
Appeal	I	S	D*		M*	R
Close Nominations or Close the Polls		S		A	$\frac{2}{3}$	
Consideration by Paragraph or Seriatim		S		A	M	
Create a Blank		S			M	
Division of a Question		S*		A	M*	
Division of the Assembly	I				*	
Objection to the Consideration of a Question	*				$\frac{2}{3}$	R*
Parliamentary Inquiry	I				—	
Point of Information	I				—	
Point of Order	I		*		+	
Reopen Nominations or the Polls		S		A	M	R*
Request for Permission to Withdraw a Motion	*	*			M	R*
Suspend the Rules		S			$\frac{2}{3}$ *	
Motions that Bring a Question Again Before the Assembly						
Take from the Table		S			M	
**Rescind or Amend Something Previously Adopted		S	D	A	*	R*
**Discharge a Committee		S	D	A	*	R*
Reconsider	*	S	D*		M	

## Basic Parliamentary Information

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Regional (international) Structure- visit the website [www.dkg.org](http://www.dkg.org) and click on the About tab.

For information on ceremonies, refer to [www.dkg.org](http://www.dkg.org) Resources > DKG Officer Resources > Ceremonies

<b>Forms</b>	All forms are available at <a href="http://www.dkg.org">www.dkg.org</a> > MYDKG > Forms
<b>Contribution</b>	Form 43 – Society Schools for Africa Non Dues Revenue (information)
<b>General</b>	Form 70 – Travel Expense Reimbursement Form Form 84 – Emergency Fund Request Photo Permission Form
<b>Membership</b>	Form 6 – Report of Death of a Member Form 21 – Request for Charter Form 21b – Request for Charter Instructions Form 27 – Change of Address Form (Chapter Use Only) Form 81 – New Member Form (Chapter Use Only) Form 82 – Chapter Member Biographical Data Sheet (Chapter Use Only) Form 83 – Reinstated Member Form (Chapter Use Only) Form TR-A – Transfer Request Form TR-19 – Transfer Letter from President
<b>Press Release</b>	Press Release Chapter President Press Release Template
<b>Reports</b>	Form 110 – Chapter Officers Report Form
<b>Treasurer</b>	Form 2 – Chapter Necrology Report Form 15 – Chapter Treasurer Form Form 18A – Report of Dropped Members Form 87 – Change of Treasurer Form (Word) Form 87 – Change of Treasurer Form (PDF) Form 123 – Dues Reminder Single Form 990 – IRS
<b>Webmaster</b>	Form 72 – Society Website Compliance

# FORMS

## Appendix

### Glossary of DKG Terms

1. **Administrative Board** – a board of international officers and related personnel that reports to the international Executive Board and carries out the plans and policies adopted by the international convention; meetings, typically, are held twice a year.
2. **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.
3. **Chapter Assessment** – money in addition to dues, may be levied to active members only by vote of chapter members.
4. **Charter** – a document issued by the DKG when a new chapter is installed.
5. **Charter Member** – a woman who becomes a member or transfers membership at the time of the installation of a new chapter.
6. **Collegial Exchange** – an informal magazine that promotes the professional and personal growth of members through publication of writings.
7. **Committee** – one or more persons, elected or appointed, to consider, investigate, and/or take action on certain matters.
8. **A standing committee** has a continuing function as established by name in chapter rules. If chapter standing committees are not established, the constitutional work is assigned to person(s), e.g., executive board, officer, or member. Those responsible for the work of each area are identified in the chapter rules.
9. **A special committee**, also called an ad hoc committee or a task force, is appointed as the need arises to carry out a specific task not assigned in chapter rules to a standing committee. A special committee automatically ceases to exist upon completion of its task. Chapter rules designate who authorizes the appointment of special committees.
10. **Cornetet Awards** (Lucile Cornetet Awards for Professional Development) individual and seminar awards are offered by The Delta Kappa Gamma Educational Foundation to educators to enhance professional development; awards are funded by a bequest from Lucile Cornetet, an Ohio member.
  - a. **Individual awards** – financially assist employed educators, members and nonmembers, in participation in professional development opportunities (e.g., seminars, lecture series, national certification, on-line courses, workshops, and non degree programs) through approved providers such as colleges, universities, and professional organizations other than the DKG. Award applications are reviewed February 1, May 1, and September 1 each year.
  - a. **Seminar awards** – enable sponsorship of professional development seminars. Regions, areas, and state organizations of DKG may apply for seminar awards to financially support professional development opportunities for member and nonmember educators in locales.
11. **Delta Kappa Gamma International Educators Foundation (DKGIEF)** - a US 501(c)(3) organization established in 2020. As a result donations to the following funds are tax deductible in the U. S. and may also be deductible in other countries: Educators Book Award, Emergency, Eunah Temple Holden

- Leadership Development, Golden Gift, International Speakers, Scholarship, and World Fellowship, Educational Projects and area of greatest need.
12. **Dissolution** – a procedure followed when a chapter or a state organization ceases to exist. An alternative to dissolution is the merging or consolidating of chapters.
  13. **DKG Ignite** – a seminar, currently held at the University of Texas in Austin. The seminar, financed by the Golden Gift Fund, provides opportunities for members to develop leadership, communication, and management skills.
  14. **DKG NEWS** – the international newsletter, published online six times a year, is frequently referred to as the NEWS. All issues are archived and available online.
  15. **DKG Store** (*Awards Concepts*) - [www.dkg.org/store](http://www.dkg.org/store) To purchase DKG branded items.
  16. **Dropped** – term used when membership is terminated.
  17. **Editorial Board** – appointed by the international president upon recommendation of the assigned administrator and the editor. Members may submit an application for appointment. The board works with the editor to select manuscripts, develop editorial policy, select style guidelines, and in collaboration with the Communications and Marketing Committee establish themes for The Delta Kappa Gamma Bulletin.
  18. **Emergency Fund** – provides assistance to a member who sustains major loss from earthquakes, floods, tornadoes, hurricanes, or other catastrophic disasters of nature. Gifts are currently Five Hundred U.S. Dollars (\$500). A chapter president notifies a member's home state organization president of a member's eligibility for the gift.
  19. **Executive Board** – group of elected and appointed officials who meet to consider the work of DKG; the board acts for and represents the membership. Executive boards function at the chapter, state organization, and international levels of DKG.
  20. **Forums** – representative groups, funded by DKG, established for Canada, Europe, Latin America, and the United States to take action on educational activities of concern to members.
  21. **Founders** – an upper case F is used when referring to the twelve original members (Founders) of the DKG; a lower case f is used when referring to the original members (founders) of a state organization. Members of a chapter at the time of its installation are called charter members.
  22. **Guidelines and Policies/Procedures (GAPP)** - A compilation of the guidelines, policies and procedures approved by the International Executive Board.
  23. **Grant-in-Aid** – a monetary award granted by a state organization or chapter that is supported by funds other than the U.S. One Dollar (\$1.00) scholarship fee. The award is for a member/non-member. The specific title of a grant-in-aid award is the choice of the presenter.
  24. **Inclusion** - All educators who identify as women may be invited to membership.
  25. **International Conference** –international event held in odd-numbered years. Conferences are held to disseminate information regarding DKG activities and to provide educational workshops and may include leadership training. DKG business is not conducted at an international conference.
  26. **International Convention** – the meeting of the DKG held in even-numbered years for conducting business. Delta Kappa Gamma has no convention delegates or proxy voting; a member attending an international convention

- may make motions, enter discussions, and vote except in cases where a roll call vote is taken.
27. **International Executive Board** – the chief governing board of the DKG; voting members are state organization presidents, international officers, members-at-large, area representatives, and past national and international presidents; ex-officio members without vote are the international parliamentarian, state organization executive secretaries, and DKG Headquarters professional staff. Meetings are held biennially, at least one day in advance of the international convention and following the last business meeting.
  28. **International Scholarship** – a scholarship offered annually to a member pursuing an advanced degree. Up to thirty (30) international scholarships may be awarded, each in the amount of U. S. Ten Thousand Dollars (\$10,000) for doctoral study and Six Thousand Dollars (\$6,000) for other postgraduate study.
  29. **Leadership Development Training** – Training sessions conducted by the international Leadership Development Committee for incoming state organization leaders.
  30. **Leadership Discovery Centre** - the purpose of the Centre is to inform, educate, inspire and engage members and non-members in finding the latest research and information regarding many issues facing educators from all over the world.
  31. **Orientation/Reorientation** – the process of sharing with prospective members or members the details and/or an overview of DKG projects, programs, and activities.
    - a. The International Membership Committee has prepared Pride in the Big Picture and Sustaining Pride in the Big Picture to assist chapters.
  32. **Paraphernalia** – the items sometimes used in ceremonies of the DKG.
  33. **Quorum** – the minimum number of voting members who must be present for business to be conducted at a meeting. A quorum for chapter business is determined by the chapter.
  34. **Reinstatement** – a process by which a former member is restored to membership.
  35. **Resignation** – a member’s request, typically in writing, that membership be terminated.
  36. **Revitalization** - The process of implementing an intervention plan when a state organization shows signs of stagnation or ceases to thrive.
  37. **Roll-call Vote** – taken when requested by a majority vote of those present or when requested by five (5) state organization presidents at an international convention or five (5) chapter presidents at a state organization convention. The state organization president or chapter president shall cast the vote for the state organization or the chapter, one (1) vote for each five (5) active or reserve members or major fraction thereof within the state organization or the chapter. The vote may be divided.
  38. **Social media** - Located on the Homepage of [www.dkg.org](http://www.dkg.org) and includes Facebook, DKG Art Gallery, Blogs, YouTube Channel, Linkedin, X (Twitter), Instagram, Pinterest, and DKG Podcasts.
  39. **State Organization Convention** – is the decision-making body of the state

organization. State organizations shall hold at least one state organization convention each biennium. The date and site shall be determined by the state organization executive board.

40. **The Delta Kappa Gamma Bulletin** – includes two formats: a scholarly journal and a magazine which can be found under Publications on the website.
41. **The Delta Kappa Gamma Society International** – is the corporation’s legal name. Note the capital T in the first word.
42. **Termination of Membership** – a member’s affiliation with the DKG is terminated for non-payment of dues and fees, resignation, or death.
43. **World Fellowship** – a grant provided for graduate study to a woman who is not a DKG member. The grant is for graduate study at a university approved through the International World Fellowship Committee.



## Past National and International Presidents

### National Presidents

1929–1933	Dr. Annie Webb Blanton, Texas*
1933–1936	Norma Smith Bristow Salter, Alabama*
1936–1938	Mamie Sue Bastian, Texas*
1938–1940	Dr. Maycie K. Southall, Tennessee*
1940–1942	Dr. Emma Reinhardt, Illinois*
1942–1945	Dr. M. Margaret Stroh, District of Columbia*
1945–1948	Dr. Catherine Nutterville, Montana*
1948–1950	Birdella M. Ross, Minnesota*

### International Presidents

1950–1952	Eunah Temple Holden, Florida*
1952–1954	J. Maria Pierce, California*
1954–1956	Edna McGuire Boyd, Indiana*
1956–1958	A. Margaret Boyd, Ohio*
1958–1960	Ola B. Hiller, Michigan*
1960–1962	Zora Ellis, Alabama*
1962–1964	Alida W. Parker, California*
1964–1966	Dr. Carolyn Guss, Indiana*
1966–1968	Nell B. McMains, Texas*
1968–1970	Dr. Dorothy L. Johnson, District of Columbia*
1970–1972	Dr. Mary Frances White, Kansas*
1972–1974	Phebe H. Emmons, North Carolina*
1974–1976	Esther H. Strickland, Ohio*
1976–1978	Nadine M. Ewing, Illinois*
1978–1980	Bernice Conoly, Oregon*
1980–1982	Sarah Tobolowsky, Texas*
1982–1984	Dr. Gloria R. Little, Arizona*
1984–1986	Jessie Sim, Texas*
1986–1988	Dr. Barbara Baker, Virginia*
1988–1990	Marjorie J. Allen, California*
1990–1992	Dr. Janet Shelver, South Dakota
1992–1994	Dr. Ruby A. Matthews, South Carolina*
1994–1996	Dr. Irene Murphy, Pennsylvania*
1996–1998	Dr. Paula A. Dent, Michigan*
1998–2000	Evelyn Barron, Mississippi
2000–2002	Carol Mueller, Nevada
2002–2004	Jean Gray, Maryland*
2004–2006	Jacklynn Cuppy, Alberta
2006–2008	Dr. Barbara Day, North Carolina

## International Presidents cont.

2008-2010	Dr. Carolyn J. Rants, Iowa
2010-2012	Dr. Jensi Souders, Tennessee
2012-2014	Dr. Beverly Helms, Florida
2014-2016	Dr. Lyn Babb Schmid, Pennsylvania
2016-2018	Carolyn Pittman, Arkansas
2018-2020	Cathy Daugherty, Virginia
2020-2022	Becky Sadowski, Tennessee
2022-2024	Dr. Debbie LeBlanc, Illinois

*\*Deceased*