

Chapter Checklist

Chapter

Date Chartered

Chapter #

Area

Geographical /County

The following items should be kept at the Chapter level and their whereabouts known at all times. The Executive Board should be responsible for ensuring that these items are passed to the next responsible person and keep a list of who has them and where they are stored at all times. *Every chapter may not have all of these items.

Ceremonial Items		
Item	Who has this	Where is it stored
Charter		
Official Initiate Register		
* Ceremonies Paraphernalia		
3 Brass Candlesticks		
Induction Candle Holders (#_____)		
Brass Bowl		
Brass Salver (tray)		
Bible		
Scarf		
Brass Vase/Urn		
Gavel		
Other Items		

Books/Periodicals/Publications		
<p>These items are found on the International Site (dkg.org) under Resources. Your Chapter may or may not have purchased or downloaded. You should have hard copies of the ones marked with an *. The other books can be purchased or downloaded. Out of date Guidelines, Songbooks, etc should be removed.</p>		
Item	Who has it	Where is it stored
*Our Heritage Volume 1		
*Our Heritage Volume 2		
*Our Heritage Volume 2 CD		
*Our Heritage Volume 3 DVD		
*Presidents of Alpha State Vol 1		
*Presidents of Alpha State Vol 2		
*Constitution/Standing Rules – current addition		
*DKG Society Handbook (Nov '23)		
Guidelines for Chapter Officers– (out of date copies)		
Guidelines for Committee Chairs (out of date copies)		
*may be purchased or downloaded at dkg.org		

Chapter Permanent Records

The Chapter should keep 5 to 10 years of each item listed below at the Chapter level. Items older than 10 years should be put into folders and sent to the TSO Archives Committee Chair or TSO Headquarters. These items are never to be destroyed. One copy of each item should be kept and organized to be sent to Archives after 5 to 10 years.

Item	Who has	Where is it stored
Chapter Minutes – should have signed minutes for each chapter and executive board meeting		
Chapter History – should have one per year or by President’s biennium		
Membership Records –copy of membership from Dues Portal.		
Chapter Yearbooks – only the <u>chapter</u> information is kept		
Scrapbook or Photos of meetings or special events – <u>label</u> the event and people in the photo		
Historical Society Correspondence – Notes or letters from a Founder or State President		
Newspaper articles		
Chapter Recognitions/Awards		
Monthly Sign –in sheets or Attendance Sheets		

Chapter Financial Records

Please refer to the current edition of the DKG Society Handbook to know when items can be shredded and how long items need to be kept.

Item	Who has	Where is it stored
Treasurer's Monthly Reports/Financial Reports/Auditor Reports – Keep permanently; store at Archives after 7 years		
Bank Statements/ Reconciliations for Checking and Savings Account – Keep for 7 years then shred		
Acc'ts Receivable/Acc'ts Payable – Keep 7 years and then shred.		
Checkbook and extra checks – Deposit slips and copies of checks keep 7 years and then shred. Current checkbook keep.		
Cash disbursements/Cash Receipts Journal - Keep on-going record permanently.		
Budgets – Keep for 4 years; store at Archives		
Tax Returns – 990N keep permanently, may store at Archives after 7 years		
Scholarship/Grant Information if Chapter gives a scholarship/Grant – Keep permanently		

