

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 passing these items to the next responsible person and keep a list of who has them and where they are stored at all times.

Ceremonial Items		
Item	Who has this	Where is it stored
Charter		
Official Initiate Register		
Ceremonies Paraphernalia		
3 Brass Candlesticks		
Initiation Paraphernalia Initiate Candle Holders (# _____)		
Brass Bowl		
Brass Salver (tray)		
Bible		
Scarf		
Brass Vase/Urn		
Gavel		
Other Items Ex. – Song Books		
Other Items Ex. – Ceremony Book		

Books/Periodicals/Publications

These items are found on the International Site under Resources. Your Chapter may or may not have purchased or downloaded. You should have copies of the ones marked with an *.

The other books can be purchased or downloaded.

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		
Go To Guide – current addition		
Guidelines – Chapter President – current addition		
Guidelines – Chapter Treasurer – current addition		
Guidelines – Chapter Membership Committee Chair Current addition		
Guidelines – State Organization & Chapter Communication & Publicity Committee Chair – current addition		
Guidelines – Finance Committee – current addition		

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 can be put in folders and sent to Archives at TWU in Denton or sent to Archives Committee Chair or 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 a set of minutes for each meeting (bound by biennium)		
Chapter History – should have one per year or by President’s biennium		
Membership Records – Annual report (Form 15) to State and copy of membership from Dues Portal.		
Chapter Yearbooks – only the chapter information is kept		
Scrapbook or Photos of meetings or special events – be sure to label 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 addition of the Guidelines for Chapter Treasurers to know when things 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		
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		
Tax Returns – 990N keep permanently, may store at Archives after 7 years		
Scholarship/Grant Information if Chapter gives a scholarship/Grant – Keep permanently		

