

### Chapter KRS - 10 Best Practices

- 1) Form 50 (Chapter Officers) and Form 53 (Chapter Roster) should be emailed to IHQ Membership Office
  - a. Immediately after new officers are installed or after the first Chapter Meeting of the Fiscal Year (whichever comes first)
  - b. Both Forms are to be updated and reissued to IHQ if any changes occur
    - i. New Officers
    - ii. New Members initiated into Chapter or Transfer into Chapter
    - iii. Member enters Omega Chapter
- 2) Assure a Form 35 (Chapter Transfer) is sent to IHQ as required if a Member transfers from or to the Chapter
- 3) Submit a Deceased Member Form to IHQ immediately upon the occasion of a Member moving to Omega Chapter
- 4) When receiving funds from a Chapter Member (dues, other revenues or other payments) issue a receipt for the monies received:
  - a. Numbered
  - b. Dated
  - c. Signed by the Chapter KRS
  - d. Showing the check number on the funds received or marked "cash payment"
  - e. Detailed to break down what the funds were for:
    - i. eg: \$350 Received from Bro. I. B. Goode
      1. \$200 IHQ Building Fund
      2. \$100 Graduate Dues
      3. \$ 50 Boat Ride Tickets
- 5) The Meeting Minutes should reflect fund transactions
  - a. Cash Amounts received from
  - b. Check Amounts and numbers received from
  - c. Receipt numbers issued to
  - d. Motions that approve funds to be disbursed
  - e. Checks written to (info received from Chapter KF)
  - f. Minutes should be stored in hard copy and electronic format
- 6) A record should be maintained of all transactions, interfaces and submissions to IHQ.
  - a. Record the date and time
  - b. Record the name of the person(s) at IHQ who were involved (This is a critical item)
  - c. Record any sequential numbered submission documents
    - i. Chapter checks
    - ii. Money Orders
    - iii. Lock Box Forms
    - iv. Track-It Tickets
- 7) Dues payments are to be made as received from Chapter Members on a regular and timely basis
  - a. Do not wait for all Members to submit dues before submitting dues already received
  - b. Submit dues payments as early in the Fiscal year as possible
- 8) Confirm that fund amounts and dates submitted to IHQ match the supporting document information:
  - a. Do Not Submit a Lock Box Form with a check if the amounts do not match
  - b. Do Not Submit a Lock Box Form that is dated substantially differently (more than 3 days) from the date of the check
  - c. Request review and approval from the Chapter Basileus before (or immediately after) submission
- 9) Confirm that the data in the IHQ Membership database for each Chapter Member is correct:
  - a. Mailing Address
  - b. Phone Number
  - c. Photo (Meets Member Photo requirements and is current)
  - d. Other
- 10) Distribute all information received from IHQ to the Chapter Members

# Chapter Equipment List

## Log Book for the Chapter KRS Records

- The log book should be bound with pages that are lined (An Engineer's notebook is a perfect example of this type of log book)
- The book should be dated to show the date of the first and last entry into the book
- The pages of the book should be scanned after each meeting to create an electronic copy of the rough draft meeting "Minutes"

## Permanent Ink Writing Instruments

- Entries in the KRS Log Book are to be made with permanent ink. It is acceptable to have notes in the books that are altered as long as each change is initiated by the KRS.
- All checks, receipts and other documents are to be written with permanent ink.
- It Is Not Required That All Chapter Correspondence and Documents Are Written or Signed In Purple Ink. (There is nothing wrong with using purple but it is NOT a requirement)

## Voice Recorder

- A voice recorder can be a tremendous aid to the Chapter KRS when transcribing the Minutes of a meeting especially if the KRS notes fail to capture some significant event or decision.
- Any recorder type is good but, a digital recorder will allow a permanent record to be kept and shared with others

## Digital Camera

- The Chapter KRS should be equipped to capture photos required for Member photo ID Cards (Financial cards)
- The camera should not be the same camera used for other Chapter "photo opportunities" (picnics, parties, road trips) as it is intended for Chapter Meeting purposes
- Camera should be compact with a built in flash, removable memory card and capable of a photo quality of 5.0 mega pixels or better.

## Laptop Computer

- A computer is now an essential part of the KRS gear. Even if the computer is "loaned" to the Chapter for meeting purposes, it is still essential.
  - Equipped with Microsoft Office Suite (Excel, Power Point, Word)
  - CD Burner installed
  - Internet Browser Capable
  - Flash Card (Jump Drive/ Memory Stick) available (1Gb Recommended)
  - Multiple USB (2.0) ports onboard