

# DOP Headquarters Guide



## *Daughters of Penelope*

### Everything You Need To Know About Headquarters and More

Dear Sister:

Hello and Welcome to the Daughters of Penelope!

This guidebook is designed to help every Daughter become familiar with DOP Headquarters and to allow for a better understanding of the procedures that are necessary to follow so as to ensure smooth transactions and correspondence with Headquarters.

For any questions or comments, please do not hesitate to contact me via e-mail at [elena@ahopa.org](mailto:elena@ahopa.org) or via telephone at (202) 234-9741.

Sincerely in Theta Pi,

*Elena Saviolakis*

DOP Executive Director

## Membership

**Q: What is Life Membership?**

A: A Daughter of Penelope who has completed fifty years of continuous membership in the Order shall be entitled to Life Membership and shall be declared a Life Member. Per capita payment for members with 50+ continuous years as of the January 1, 1999 date will be waived. Please be aware that members attaining life membership status past this date and thereafter shall be required to pay full chapter dues including per capita. Life members who qualify for the per capita waiver have the word WAIVED in the paid through column on the chapter's active roster.

**Q: How do I fill out reinstatement and new membership applications completely?**

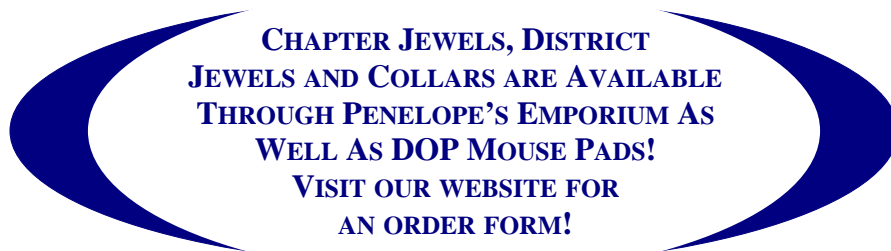
A: These applications should preferably be typed to avoid any misspellings of a member's name in the system. Be sure to include the ID numbers of those reinstating and the initiation date of new members on these applications so as to avoid blank initiation dates and future confusion. If blank initiation dates are submitted, the membership system cannot properly track the member's years of service.

**Q: How should I make chapter roster corrections?**

A: The rosters are mailed out along with your chapter's billing twice a year and are to be returned to headquarters with any corrections made directly onto the roster.

**Q: Can I delete or drop inactive members from the chapter roster?**

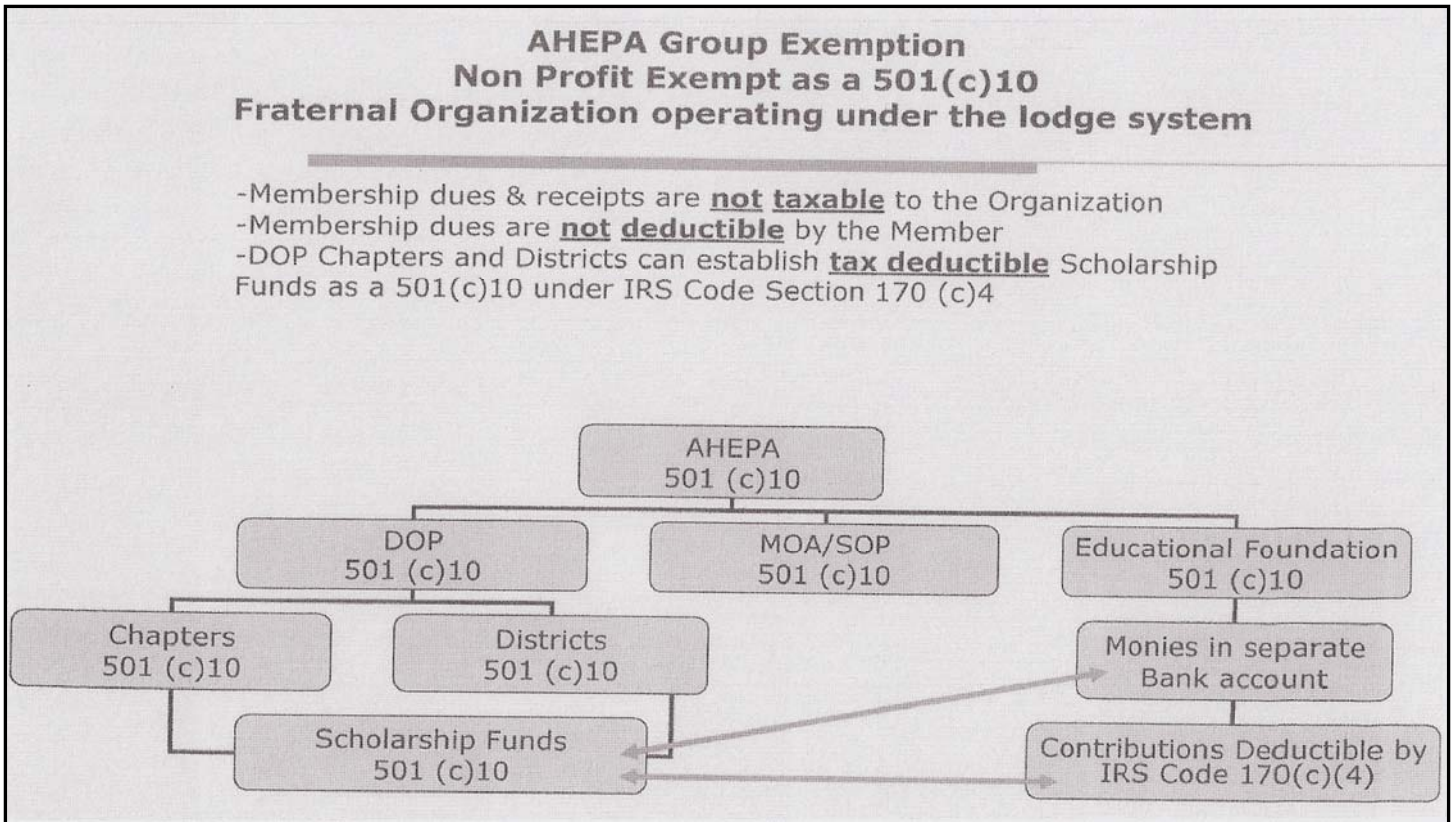
A: Yes. Please make a note on the roster as to who should be dropped from the roster and return the roster to HQ.



## Penelope's Emporium

- ◆ Our Penelope's Emporium catalog can be found on our website. All Penelope's Emporium Merchandise is purchased through Headquarters.
- ◆ ***Orders from the Penelope's Emporium Catalog cannot be taken over the phone or via e-mail. Headquarters must first receive the form along with a check for the amount of the order plus shipping in order for merchandise to be mailed.*** Please refer to the updated order forms on our website when ordering as our prices have changed.

## Tax Status Chart



## Headquarters Forms

Please adhere to all deadlines and guidelines on all forms so that your chapters are properly recognized at the Supreme Convention and mailings are sent to the appropriate person. All chapter and district forms, as well as other useful information, can be found on our website at [www.daughtersofpenelope.org](http://www.daughtersofpenelope.org).

- ◆ **National Obligation Forms:** these forms are due by May 1 of the current year. There should be ONE check for the total amount which includes the chapter assessment fee, Maids of Athena fee, which is a minimum of \$25 (this fee is mandatory regardless of whether or not there is an MOA chapter in your area), and the Daughters of Penelope Scholarship fee, which is a minimum of \$40. **Mandatory Projects do not require a minimum but do require a monetary donation.**
- ◆ **Return forms such as Chapter Election Forms to Headquarters promptly so that our system can be updated.** All mailings go to Chapter Presidents, so it is very important that the right person is recorded with the correct title and address in the system. Chapter presidents should include a valid e-mail address as well on their chapter election forms. If the Chapter President does not have e-mail capabilities, please include an e-mail address of another officer if applicable.

## Tax Status, EIN & E-Postcard Questions & Answers

### 1) What is our Tax Status?

The Order of AHEPA has a group exemption under 501(c)(10) of the Internal Revenue Code, which is granted to a domestic fraternal society, order or association operating under the lodge system with net earnings devoted exclusively to religious, charitable, scientific, literary, educational and fraternal purposes and which does not provide for the payment of life, sick, accident or other benefits. Since the Order has a group exemption, all chapters and districts are also treated as exempt organizations under 501(c)(10), as well as the affiliated entities of the Order, such as the Daughters of Penelope, Maids of Athena and Sons of Pericles.

- ◆ The 501(c)(10) tax exemption only exempts the Daughters of Penelope from paying Income Tax on membership dues **received by your Chapter** from income tax and therefore your chapter dues cannot be deducted from your tax return.
- ◆ Donations to a 501 (c)(10) organization are deductible as charitable contributions on the donor's federal income tax return as long as the Chapter uses the contribution exclusively for religious, charitable, scientific, literary or educational purposes (not fraternal purposes). **The Chapter must open up a separate bank account for the receipt and disbursement of these deductible contributions and cannot co-mingle the contributions with Chapter operating funds.** If a donor requests a tax exempt number in connection with a contribution, the Chapter should provide a letter informing the donor that the funds were paid to the Daughters of Penelope Chapter #xxx Fund established pursuant to Section 170 (c)(4) of the Internal Revenue Code for educational, charitable or one of the above exempt purposes.
- ◆ The fact that Financial Institutions require Federal ID numbers on accounts is the primary reason for a DOP Chapter to have one. **Each chapter must have their own IRS assigned number (EIN).** A Chapter cannot use the DOP EIN number, just like a daughter cannot use her mother's social security number. DOP Headquarters has a listing of Chapter numbers and can give the EIN to a Chapter officer upon request. If a Chapter is in need of and does not have an assigned number, DOP Headquarters will assist the Chapter in filing for an EIN. If a Chapter has already issued an EIN on their own, the EIN can be added to our umbrella.

### 2) Q: What is an EIN?

A: An Employer Identification Number (EIN) is also known as a Federal Tax Identification Number, and is used to identify a business entity. Generally, businesses need an EIN. All Chapters and Districts are now required to have an EIN according to the IRS.

### 3) Q: What is an E-Postcard or Form 990-N?

A: Small tax-exempt organizations whose annual [gross receipts](#) are [normally \\$25,000 or less](#) are required to electronically submit Form 990-N, also known as the e-Postcard. The Pension Protection Act of 2006 added this filing requirement to ensure that the IRS and potential donors have current information about your organization.

After repeated attempts to inform our chapters of the EIN requirement, unfortunately only 10% of our chapters complied. In order to eliminate potential problems with the IRS, Headquarters mobilized their efforts to address this situation. Headquarters has issued EIN's for those chapters that do not have one under the AHEPA umbrella according to the IRS.

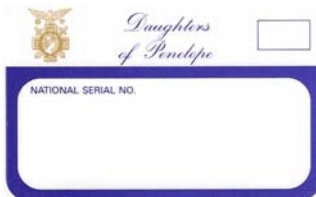
DOP Headquarters also notified each chapter that a new IRS procedure was in effect. This procedure mandated that every chapter with gross receipts less than \$25,000 under the AHEPA tax exempt umbrella needed to file an [annual online e-postcard](#) or IRS Form 990-N (Chapters and Districts must have an EIN to file an e-postcard). This filing is due by the 15<sup>th</sup> day of the 5<sup>th</sup> month after the end of the chapter's tax year. After repeated attempts to inform our chapters of this new requirement, again only 10% of our chapters complied.

In order to eliminate the risk of our chapters losing their tax exempt status, Headquarters mobilized their efforts to address this situation as well. Headquarters has completed the filing for all of our chapters and districts for the first year. Any chapter with gross receipts over \$25,000 in any tax year must seek professional tax advice in their local jurisdictions and notify Headquarters. An IRS form 990 may be required instead of the *e-postcard*.

**Headquarters is pleased to announce that through the 2010-2011 Budget, the Delegation at the Supreme Convention in Montreal, Canada voted to have Headquarters continue the e-postcard filing for all chapters and districts every year which is a great service to all the chapters and districts.**

## Chapter Billing

- ◆ **Use the Chapter billing Form that is sent to all chapter presidents twice a year.** This form states exactly who is required to pay and how much is required of them so as to be up to date with dues. This form is legible and in alphabetical order. If you have new members or do not see members on this form that should have been included, kindly print clearly and in alphabetical order when completing your remittance forms. This allows for a more efficient data entry and payment process.
- ◆ **Send in dues with one check as soon as possible and for the current year.** Payment of past years per capita while necessary, is the main source of roster inaccuracies and mistakes and may create havoc with the statistical records of each chapter if not properly noted. Chapters should send dues for the current year as soon as possible and avoid submitting dues at the end of the year. For example, send in 2010 dues during the first quarter of 2010 such as the month of January as oppose to the last quarter in November or December. Also, Chapter Treasurers should send one check to headquarters when submitting dues. Please do not send headquarters the individual checks from members.
- ◆ **Reinstatement fee of \$15 is waived for the month of November in honor of Founder's Day.** These reinstatements must be sent to Headquarters by **November 30**. Initiation fee of \$15.00 for new members is due with **all new membership applications plus per capita. The initiation fee is NOT waived.** Please be sure to completely fill in all application and reinstatement forms, including the date of initiation or reinstatement.
- ◆ **Reinstatements and Initiations After November 30.** According to the Constitution and By-Laws, a member who is initiated or reinstated after November 30 and pays full dues to Headquarters (\$42) shall be paid through the current year and following year (ex. 2010 and 2011).
- ◆ **At the 2007 Supreme Convention in Denver, Colorado, the delegation agreed upon a change in per capita.** Per capita for all members is \$27 annually. Reinstatement and/or initiation fees remain at \$15 each plus per capita of \$27. If a delinquent member wishes to pay previous years, per capita is \$27 for each year.
- ◆ **Membership cards will be sent out shortly after payment is received.** Our membership software system will only print cards associated with the particular payment and for the current year.



## Public Relations

- ◆ The Public Relations department is coordinated by National Headquarters in Washington D.C. The department takes good care of monitoring events and issues on Capitol Hill, across the country and overseas that affect the DOP as well as the Greek American community. In addition to this, the department ensures that the DOP name is visible in the Greek American community through media relations, news releases, e-newsletters, the website, and Penelope's Scroll. **Please note Penelope's Scroll is only available online on our website.**
- ◆ Aside from the obvious ways of communicating with headquarters (mail, phone, fax), we can be reached through the Internet. Through the efforts of this department, the DOP is online. Headquarters has a World Wide Web page and can be reached at [www.daughtersofpenelope.org](http://www.daughtersofpenelope.org). We can now disseminate information through this means of communication as well as conduct research.

## Supreme Convention Procedures Plus Questions & Answers

- ◆ **Calculating Voting Strength:** Voting strength is determined by the year-end figure of members paid in full for that year. For example, for the National Convention in 2011, your chapter's voting strength is determined by the amount of members paid through 2010 as of December 31, 2010. There is a scale, which is located in your constitution that dictates how many votes are assigned to a certain number of paid members.
- ◆ **Reporting of Delegates/Alternates:** Based on the voting strength, your chapter will vote for a certain number of delegates and alternates. The number of delegates and alternates will be the same. For example, if your chapters voting strength is three, then you will have three delegates and three alternates to report. The delegate reporting forms are mailed to each chapter in March. **The forms are to be postmarked or faxed no later than June 1 but are subject to an earlier date depending on the dates of the Supreme Convention.** Each form requires the member's name, serial number and complete address. Please type or print clearly.
- ◆ **Pre-registration:** Pre-registration is allowed from the time you know you are a delegate or alternate until the date posted on the pre-registration form. There is a significant monetary savings to each Delegate/Alternate if they pre-register. This also allows you to go through the registration line at a quicker pace.

**1) Q: If our chapter submits our delegate reporting form after June 1, can we seat delegate/alternates?**

A: Headquarters is only responsible for presenting the late forms and letters of explanation to the credentials committee at the convention. It is up to that committee to decide if there exists a viable excuse for the late reporting of the form.

**2) Q: Once we send our delegate reporting form into headquarters, can we make changes to it?**

A: If you submitted your first form prior to June 1, and the second form with the changes also comes to headquarters prior to June 1, then it is acceptable. Anything after June 1 will go to the credentials committee at the convention.

**3) Q: Will we be notified if there is a problem with our chapter's voting strength or delegate reporting form?**

A: Yes, the Chapter President or Secretary will be notified. The notification will come in the form of a letter/e-mail from Headquarters.

**4) Q: Aside from the proper reporting of delegates, are there any other criteria I must be aware of to be seated at the convention?**

A: According to the constitution, "the delegates and alternates elected by a Chapter must be members in good standing for at least one year and current dues paid to their Chapter with per capita submitted to Headquarters and must have attended at least four business meetings since July 1 of the previous year in their respective Chapters before becoming eligible to serve as delegates or alternates." The Chapter in which the delegate and alternate belongs to must also be in good standing (i.e. National Obligations and District Obligations have been fulfilled for the current year). Please refer to Article XVI in the Constitution for further details regarding the Supreme Convention requirements for chapters, delegates and alternates.

**5) Q: Must I be a delegate or alternate to pre-register?**

A: Yes.

**6) Q: Can I make room reservations for the convention by calling Headquarters?**

A: No. Reservations must be made directly with the Convention hotel by the deadline posted on all convention information. After this deadline, rooms may not be available at the convention rate or available period.

**7) Q: Can I get a refund on my pre-registration fee if I do not attend the Convention?**

A: A refund can only be issued if received at Headquarter **prior** to the convention and before the refund deadline stated on the registration form.

**8) Q: Can I pay my dues at the convention?**

A: Yes. If you have been reported as a delegate/alternate and have not paid your current year dues, you must pay them at the convention in order to be seated. So as to avoid delays and confusion however, it is best for delegates and alternates to be current in their membership prior to attending the convention. Please read Q&A #4 carefully.

## *Daughters of Penelope*

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*The Daughters of Penelope was the realization of Alexandra Apostolides Sonenfelds' dream. Her desire was to create a woman's organization and because of her perseverance and the encouragement of her husband Dr. Emanuel Apostolides, a devoted Ahepan, she formed EOS Chapter#1 with 25 charter members on November 16, 1929 in San Francisco, California. She was elected the first Grand President in 1931.*

*The objectives of the Daughters of Penelope are to promote Hellenism, Education, Philanthropy, Civic Responsibility, and Family & Individual Excellence. The Daughters of Penelope encourages and promotes loyalty to the country in which they live; cultivates the ideals and traditions of Hellenism; promotes opportunities of education; and promotes the spirit of cooperation and works closely and in harmony with the whole AHEPA Family. The Daughters of Penelope is non-partisan and non-denominational.*

## **2011 AHEPA Family Supreme Convention**



Our next AHEPA Family Supreme Convention will be at the **Fontainebleau Hotel**, located at 4441 Collins Avenue Miami Beach, Florida 33140 **July 18-23**. It promises to be an exciting week, so start making your plans now!