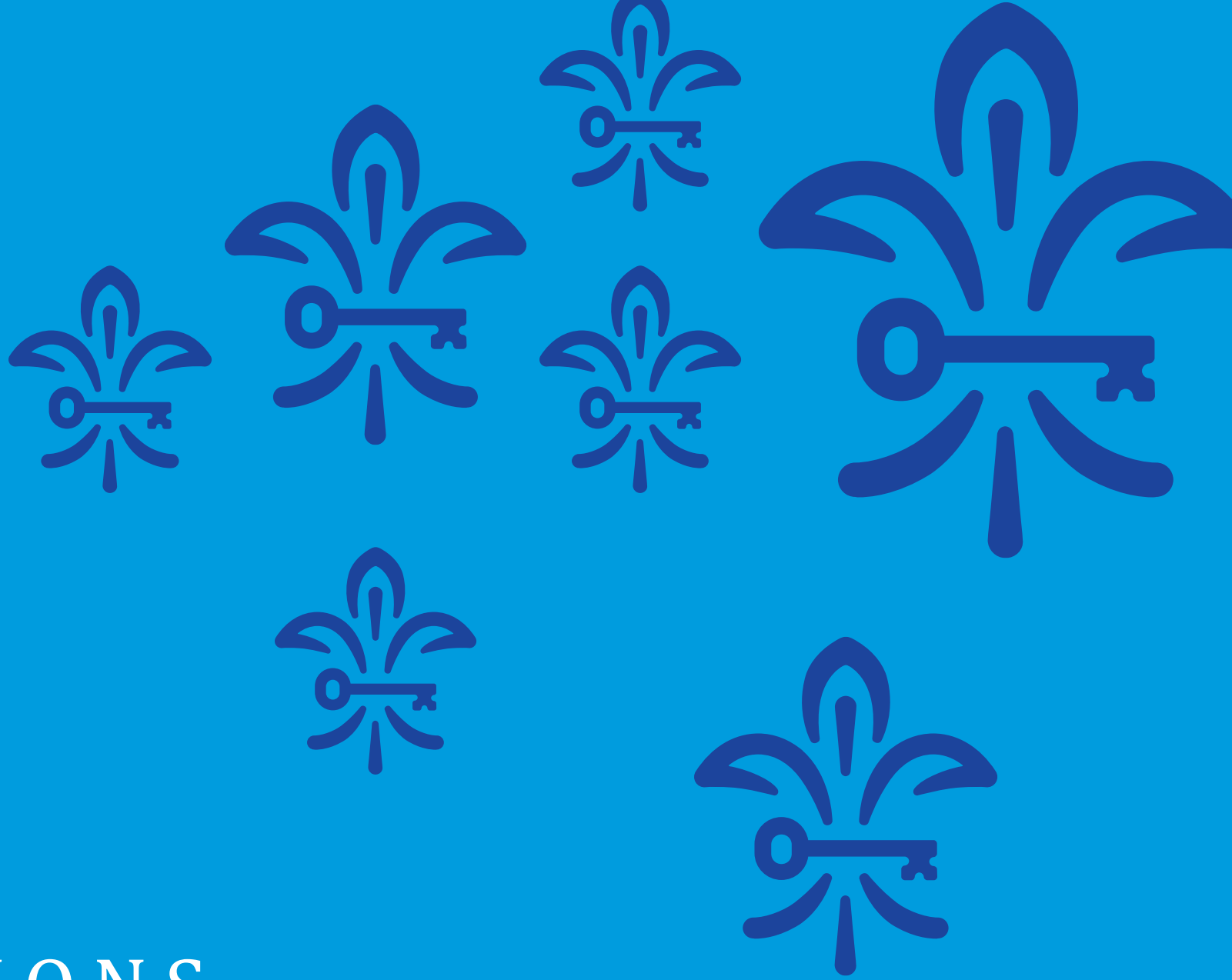


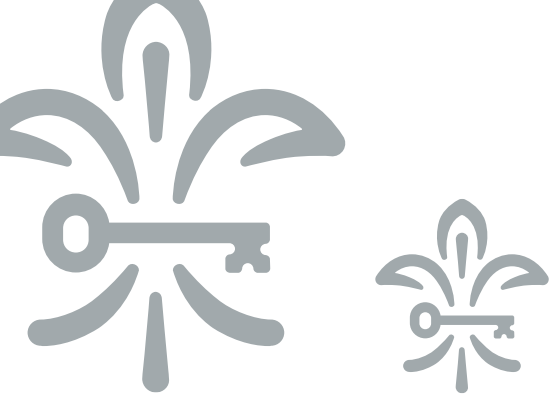

Kappa Kappa Gamma
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ALUMNAE ASSOCIATION
TREASURER TRAINING

SEPTEMBER 18, 2025



WELCOME &
INTRODUCTIONS



AGENDA

01. **Per Capita Fee Reminders**

02. **KeyReports for Treasurers**

03. **Dual Members & Dues Direct**

04. **Frequently Asked Questions**

Per Capita Fee Reminders

- Current fiscal year: July 1, 2025 - June 30, 2026
- **Per Capita Fee deadline is November 1***
- \$39 for middle alumnae
- \$29 for senior alumnae (65+ years post-initiation) & young alumnae (0-8 years post-initiation)
 - New fee structure voted in at 2022 Convention
 - Membership roster shows member stage (young, middle and senior)

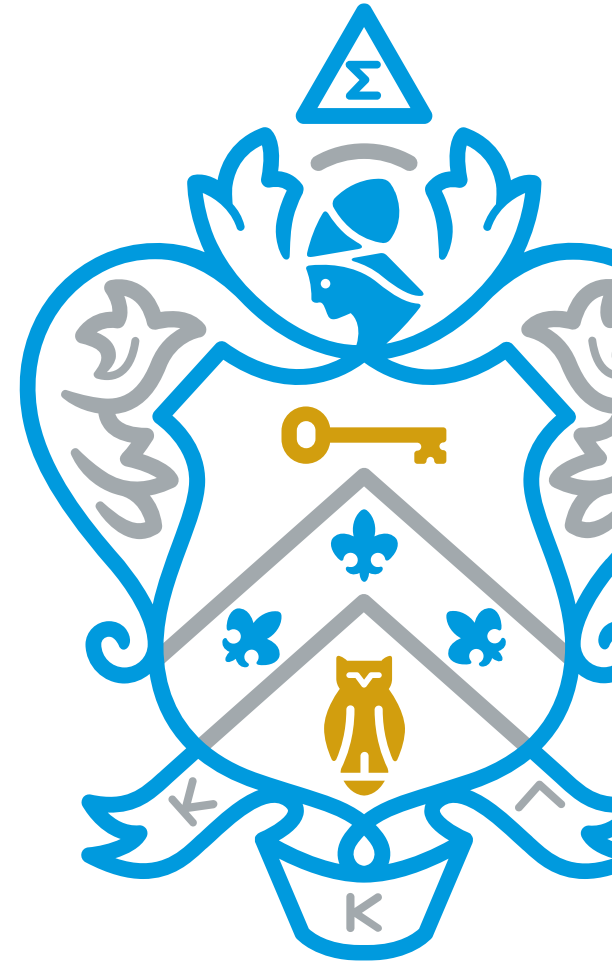
*Per capita fees should be sent to HQ as soon as they are collected. This can be done as many times as needed throughout the fiscal year.

Fraternity Policies, Policy 2, Section 9

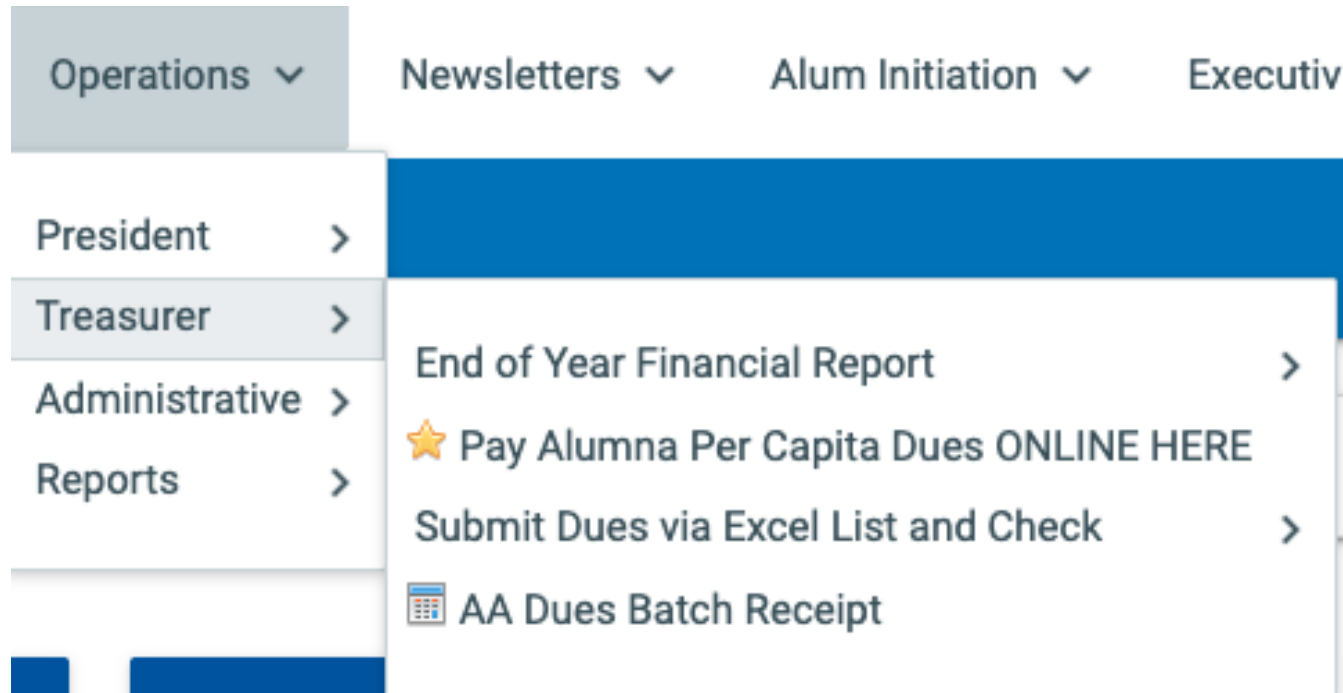
Section 9. Per Capita Fees. Alumna members must pay both the Fraternity per capita fee and local alumnae association dues in order to join an alumnae association. An alumnae association shall be responsible for collecting and submitting the per capita fees of all of its dues-paying members and officers to the extent that they have not already been paid directly to the Fraternity by the individual members. **If an alumnae association has any members who have only paid local dues and not paid their required per capita fees, then the alumnae association** shall not be considered in good standing, is neither entitled to a **Convention or election delegate** nor the right to a vote, and may be subject to the withdrawal of its charter. (See the Fraternity Bylaws, Article V. Section 8. C.)

Fraternity Bylaws, Article V, Section 8.C.

- C. Association.** An association meeting its financial and reporting obligations and that maintains standards of conduct shall be an association in good standing, and eligible for awards and representation at Convention, and shall have the right to a vote.



KeyReports for Treasurers



- Log onto KeyReports using same credentials as the Kappa website: <https://keyreports.kappakappagamma.org/>
- You will see your dashboard and association information
- Treasurer responsibilities can be found under Operations > Treasurer

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2 WAYS TO SUBMIT FEES

1



Through KeyReports directly, ACH transfer (**preferred**)
Note: This is only for associations in the U.S.



2



Through the mail

- Download the 2025-2026 Fee Report and your completed, alphabetized membership roster from KeyReports and mail a check to HQ.

Pay Per Capita Fees via KeyReports

- Before starting, have your bank information (account & routing number) and the names of members for whom you are submitting fees
- Click **Operations > Treasurer > Pay Alumna Per Capita Dues ONLINE HERE**
- Depending on how large your membership could be, the list may take a few minutes to load
- Use the search function to easily find the members you are reconciling
- Check the box next to the members you are reconciling
- Use the association bank account information via ACH to pay the total amount owed

Pay Per Capita Fees via KeyReports

● Overview ● Selection ● Checkout ● Verification ● Receipt

Step: Overview CONTINUE (Selection)

Welcome to KeyReports e-check*!
(for our Alumnae Associations located within the USA)*

The following pages contain a list of your association members so you can mark them as having paid their alumna per capita fee through your local association. Please be sure to check on the Membership Roster to see if they have already paid their per capita dues in the PAID THRU column (they do not need to pay more than once).

This replaces the process of mailing a check with your list of paid members to headquarters. We recommend doing this process in small batches as you receive payments from your members. This can be done as often as you want!

To add members to your roster for those who paid their per capita fees directly to HQ or through another association - please [email a list to headquarters](#). We hope to add this feature here soon.

Before getting started, make sure you have the following in front of you:

- Your list of paid members (first, maiden and last name - as shown in your roster - will be displayed)
- total amount expecting to pay
- your association's bank routing number and checking account number

Thank you for submitting your dues in our new platform!

Any questions, please email AlumnaeExperience@kkg.org

** ACH transactions are currently only supported from bank accounts within the USA.*

Once you hit continue, please be patient as it will take a little time to generate the full list of your association's alumnae.

Pay Per Capita Fees via KeyReports

● Overview ● Selection ● Checkout ● Verification ● Receipt

BACK (Overview) Step: Selection **CONTINUE** (Checkout)

Below is an alphabetical list of all members identified in your Alumnae Association. Place a checkmark next to each member who you are submitting a dues payment for. When complete, press CONTINUE.

> Full Name ↑	Dues Item	Balance	<input type="checkbox"/> Pay
<input type="text"/>	<input type="text"/>	<input type="text"/>	
> Christina Barber Alexander	Alumnae Alum Assoc	\$39.00	<input checked="" type="checkbox"/>
> Hanna Anderson	Alumnae Alum Assoc	\$39.00	<input type="checkbox"/>
> Jessy Anderson	Alumnae Alum Assoc	\$39.00	<input type="checkbox"/>
> Lucia Arant	Alumnae Alum Assoc	\$39.00	<input checked="" type="checkbox"/>

Pay Per Capita Fees via KeyReports

ECHECK

ACH Routing/Transit Number *

Account Holder's Information ▲

Company name

Bank Account Number *

First name * Last name *

Check Account Type

Checking Account ▼

Email address

Telephone

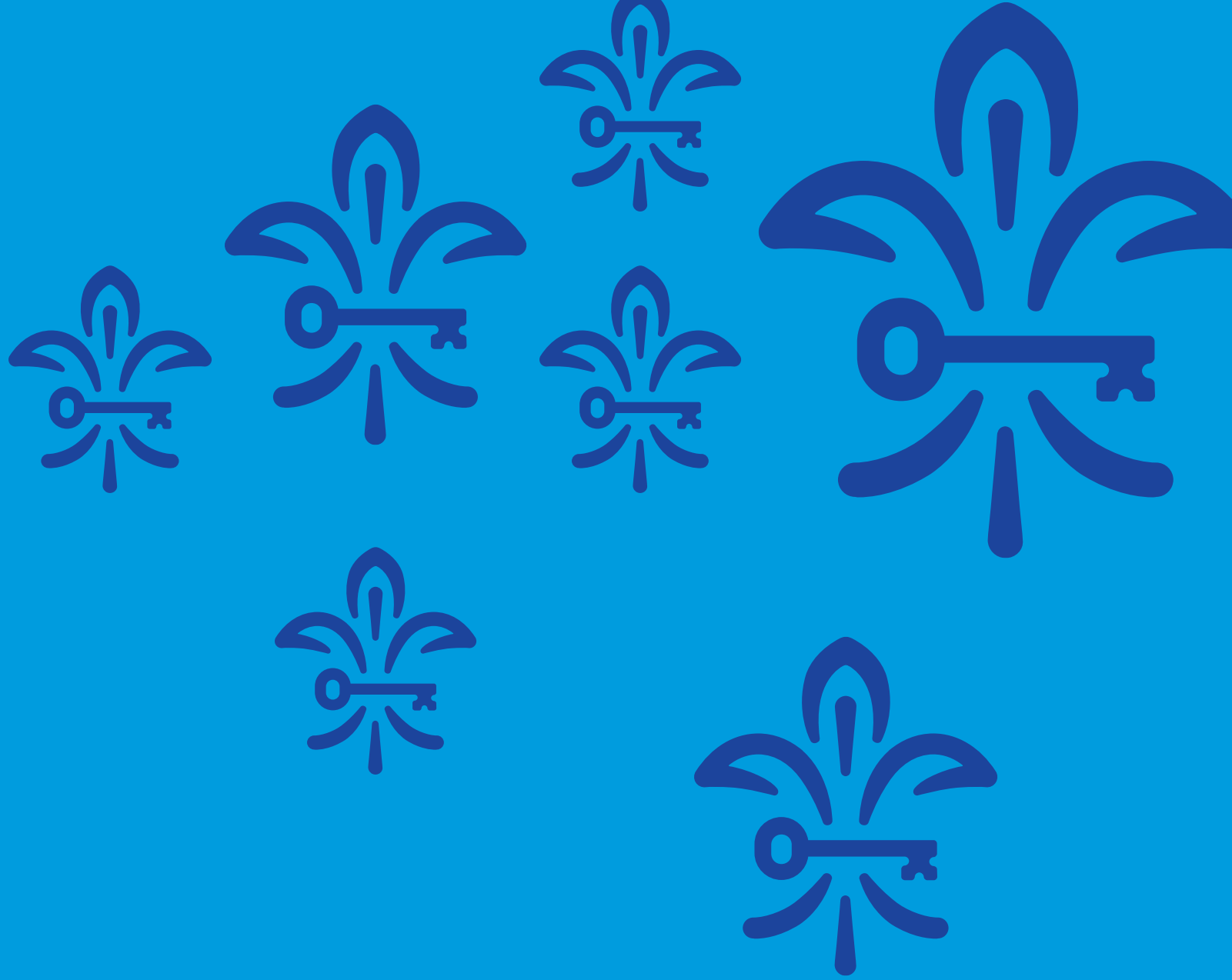
Fax

Street address line

Street address line 2

- Verify you have selected everyone you intend to pay for.
- Insert your bank's **routing** number and **account** number.
- Insert the account holder's information and click continue.
- You can click **Back** at any time if you missed someone.

[BACK](#)
(Selection)



Pay Per Capita Fees via Mail

- Click **Operations > Treasurer > Submit Dues via Excel List and Check**

The screenshot shows a navigation menu with the following structure:

- Operations ▾
 - President >
 - Treasurer >
 - End of Year Financial Report >
 - ★ Pay Alumna Per Capita Dues ONLINE HERE
 - Submit Dues via Excel List and Check >
 - 1. Download Alumnae Association Fee Report
 - 2. Download Excel file & mark paid members
 - 3. Email Excel list to AlumnaeExperience@kkg.org
 - 4. Mail check and AA Fee Report to HQ
 - AA Dues Batch Receipt
 - Administrative >
 - Reports >

Below the menu, a blue bar contains the text "Membership".

Pay Per Capita Fees via Mail

- Step 1: Click **Download Alumnae Association Fee Report** (*it will save to your Downloads folder on your computer*)
- Step 2: Click **Download Excel file & mark paid members**

- ↓ 1. Download Alumnae Association Fee Report
- ↓ 2. Download Excel file & mark paid members
3. Email Excel list to AlumnaeExperience@kkg.org
4. Mail check and AA Fee Report to HQ

The screenshot shows a web application interface with a data table and a file download menu. The table has columns for Alumnae Association, MARK AS PAID DUES TO AA, MARK AS DUAL MEMBER, ID, Informal Name, Initiated / Maiden Name, Last Name, School of Initiation, Initiation Date, Paid Thru, Alumna Per Capita Fee, Address 1, Address 2, City, and State / Province. The 'Download' icon in the table's toolbar is circled in yellow, and a yellow arrow points from it to the 'Excel' option in the file format menu.

Alumnae Association	MARK AS PAID DUES TO AA	MARK AS DUAL MEMBER	ID	Informal Name	Initiated / Maiden Name	Last Name	School of Initiation	Initiation Date	Paid Thru	Alumna Per Capita Fee	Address 1	Address 2	City	State / Province
---------------------	-------------------------	---------------------	----	---------------	-------------------------	-----------	----------------------	-----------------	-----------	-----------------------	-----------	-----------	------	------------------

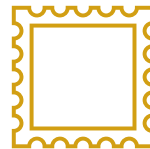
Member Type: ALUM, Bad Address: LOST,Not Lost, Purpose: Permanent,Seasonal, Current Dues Payer: Yes,No

File Format Menu: Word, **Excel**, PowerPoint, PDF, TIFF file

Pay Per Capita Fees via Mail

- Step 3: Put an X in the **green** column to mark the member as paid. Save the Excel report to your computer and attach it in an email to AlumnaeExperience@kkg.org.
- Step 4: Mail check and completed Association Fee Report to Headquarters.

*Kappa Kappa Gamma Headquarters
 Attn: Finance Department
 6640 Riverside Drive, Suite 200
 Dublin, Ohio 43017*



MARK AS PAID DUES TO AA	MARK AS DUAL MEMBER
X	

Fiscal year: July 1–June 30 Deadline to submit dues: Nov. 1

- Dues information:** Member stage and amounts can be viewed on your membership roster.
- \$29 for senior alumnae (65 years post-initiation) and young alumnae (up to eight years post-initiation).
 - \$39 for all other members.

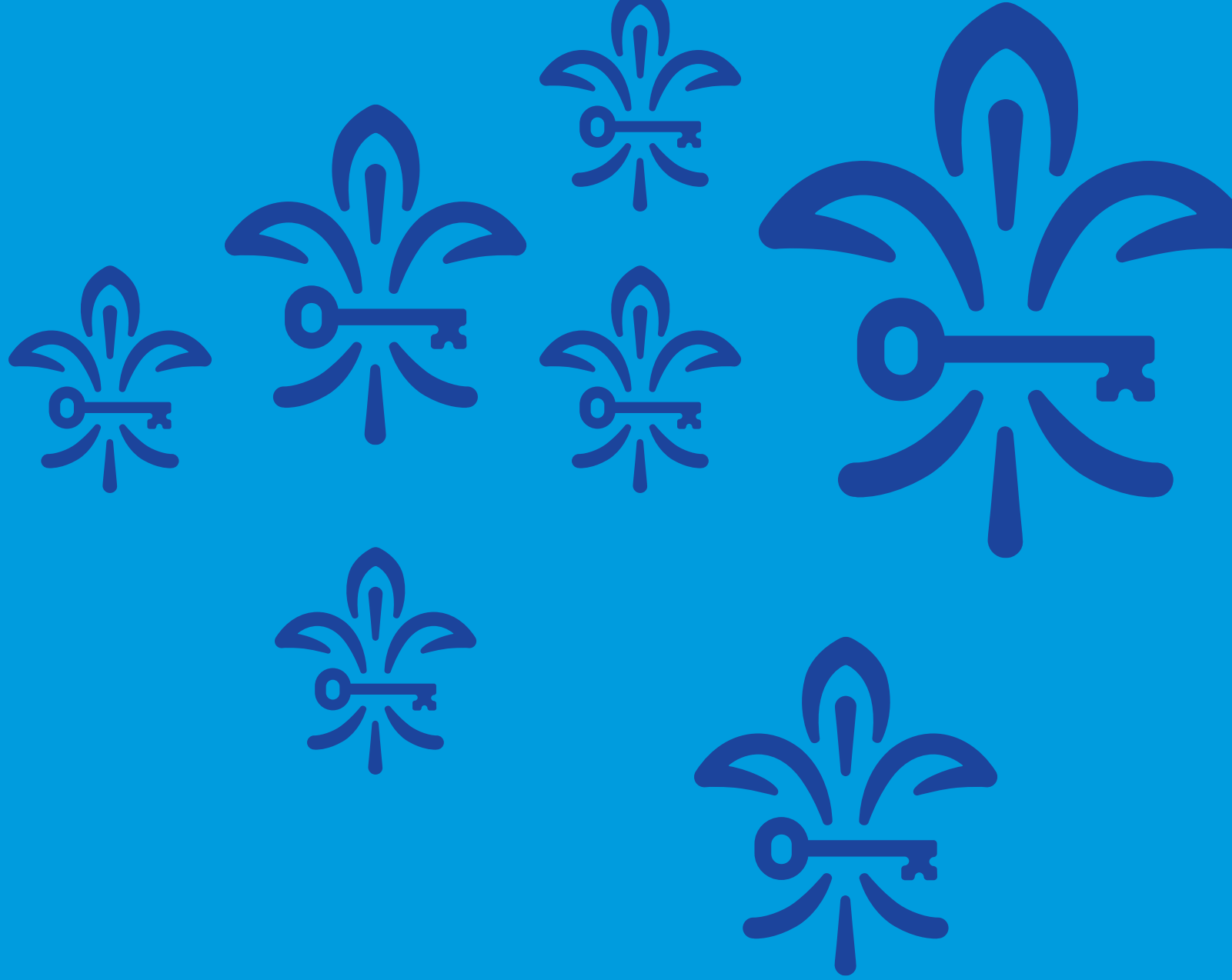
- Process for paying dues via mail:**
1. Go to [Reports](#) and click Operations > Treasurer > Submit Dues via Excel List and Check > Download Excel file to mark paid members.
 2. Download and save the Excel file.
 - a. Reminder: The roster **must** be alphabetized and marked **appropriately** or it will be sent back.
 3. Check the box next to the name of each paid member of the association.
 4. Mark any dual members. Dual members are those who have paid the per capita fee to another association.
 5. Mail this completed form, your check, and completed Excel roster to:
 Kappa Kappa Gamma Headquarters
 6640 Riverside Drive, Suite 200
 Dublin, Ohio 43017

Any overpayments under \$50 will be donated to the Kappa Kappa Gamma Foundation.

Per Capita Fee: \$29	#	X \$29	Senior or young alumnae	\$	
Per Capita Fee: \$39	#	X \$39	General members	\$	
Please submit the per capita fee for those members who have paid dues to your association. Clearly indicate dual members on your membership roster.					
Total Members Paid	#		TOTAL ENCLOSED	\$	

PLEASE COMPLETE THIS SECTION

Association:		District:	
Tax ID:			
Treasurer:			
Address:			
	(Street)		
	(City)	(State)	(ZIP)
	(Phone)	(Email)	(Date)



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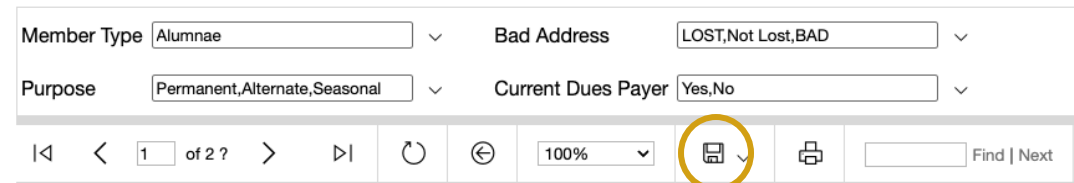
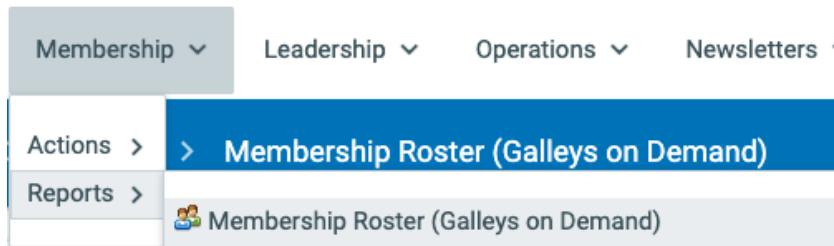
DUAL MEMBERS

You may come across alumnae who belong to more than one alumnae association. These alumnae are considered “dual members.” They can choose to pay their Fraternity per capita fee to one association with that association’s local fees. They only pay the local dues to the other association(s), as their Fraternity fees are paid only **once** during the fiscal year by only **one** association. The alumna determines to which alumnae association they pay their Fraternity fees.

If you encounter a Kappa alumna who claims dual membership when they pay their dues, please confirm if they’ve already paid their Fraternity per capita dues to an association so you can properly account for them as a member. You can also contact your Alumna Relations Specialist and have them confirm for you. When submitting your dues-paying member list to the Fraternity, please ensure that any dual members are marked as such.

Dues Direct

- If an alumna member paid Dues Direct, she only need to pay her local association whatever the local dues are.
- When downloading your galley to Excel, there is a column that shows you who has paid Dues Direct for this fiscal year. It will show as paid through 6/30/26.



Please Note: It takes 24-48 business hours for the system to show she has paid Dues Direct due to manual processing needed on our end.

AC	AD	AE	AF	AG
Paid Thru	Alum Assoc Name	Lives In Area	Dual Member	Paid Dues Direct
6/30/2026	Alumnae	TRUE	FALSE	Dues Direct

Frequently Asked Questions

What if someone paid dues to us but I cannot find them on our galley to reconcile?

- Email AlumnaeExperience@kkg.org with their information. Likely, the member has not updated their address and is therefore not associated with your AA. If she is a dual member, we can add her to your galley on the backend.

How do we let you know who is a dual or simply paid local dues?

- You can email your list (utilize the list from KeyReports) to AlumnaeExperience@kkg.org and we can ensure all members are properly reconciled.

Do we need to submit an end of year treasurer report for 2024-2025?

- No. We are currently in the process of revamping our reporting requirements and will let you know if/when something is needed.

Can we use Venmo to collect payments?

- No. Venmo can only be connected to a personal bank account. We want to protect you and the AA from any chance of embezzlement or financial misconduct so we don't allow the use of Venmo.

How can we collect payments?

- Check, PayPal, Zelle (if connected to your AA bank account)

Some Notes on PayPal...

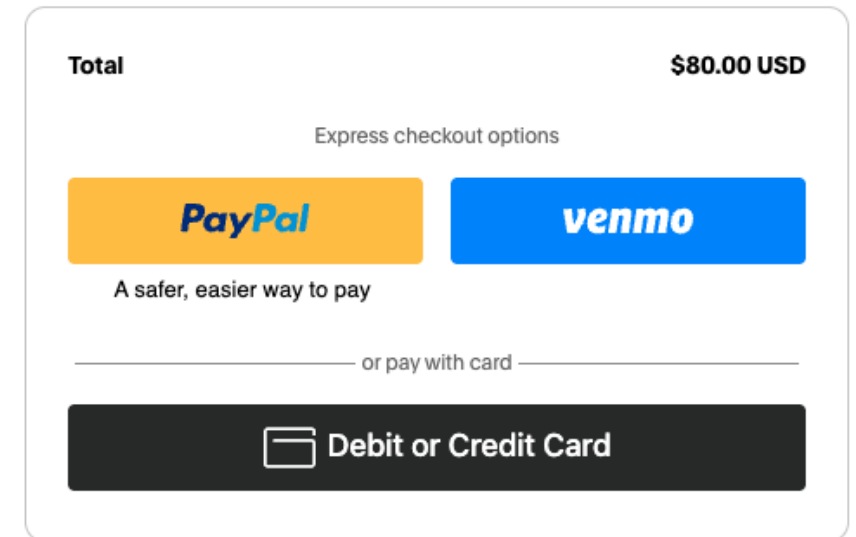
Venmo is allowable only if your PayPal site includes it as a payment option for the member. This is a feature of PayPal which allows the consumer to pay via **Venmo** to **PayPal**. We do not allow Venmo to Venmo transactions (see example).

Additionally...

An association can either absorb the cost of PayPal's transaction fees from existing funds or increase the amount of dues to cover this expense. Similar to how chapters budget, an association would set their annual budget and include credit card fees as a line item and figure out what dues need to be in order to cover all expenses.

If a member opts to cover the PayPal fees as a "donation", this would still be considered member revenue and not taxable.

Order summary



The screenshot shows an order summary with a total of \$80.00 USD. Under the heading "Express checkout options", there are two buttons: a yellow "PayPal" button and a blue "venmo" button. Below these buttons is the text "A safer, easier way to pay". A horizontal line with the text "or pay with card" is positioned below the Venmo button. At the bottom of the summary is a large black button with a white card icon and the text "Debit or Credit Card".

UPCOMING DEADLINES

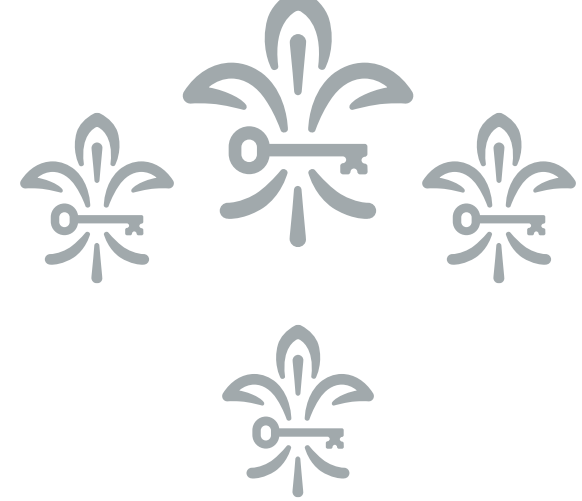
Nov. 1: Per Capita Fee Deadline

The per capita fees and an alphabetized list of each member's name, address, and information regarding their payment of per capita fees and local association fees are sent to Kappa Headquarters.

Nov. 15: 990N/e-Postcard filed by Headquarters

(Unless gross receipts are greater than \$50,000) If gross receipts are greater than \$50,000, please let us know by Nov. 15. In this case, the association must work with an outside accountant to file IRS Form 990 EZ or Form 990.





Questions?

Contact your Alumna Relations Specialist,
they are your first & best resource 😊

OR

Contact AlumnaeExperience@kkg.org

Thank you for attending! This webinar was
recorded and will be available on the Kappa
website soon.