

2010 **Elks** 2011



**CHARITY RECORDS
WORKBOOK**

To assist with online submission of Subordinate Lodge Volunteer,
Youth, Charitable and Community Service Programs

GOVERNMENT RELATIONS CHAIRMAN COPY

Lodge Name: _____ No. _____ District _____

City (if different from above): _____ State _____

*Benevolent and Protective Order of Elks
of the United States of America*

**• • • IMPORTANT • • •
RETAIN IN FILES FOR
TAX-EXEMPTION PURPOSES**

Prepared by the Grand Lodge Government Relations Committee

INDEX

1001	Youth Scholarships	1
1002	Student of Month/Year.	1
1003	Scouting Programs	2
1004	Youth Activities (Includes Youth Week).	2
1005	Antlers Program	3
1101	Youth Athletic Programs	3
1102	Hoop Shoot	4
1103	Soccer Shoot	4
1201	Special School Programs	5
1202	Handicapped Programs	5
1203	Special Equipment Used	6
1204	State Major Project	6
1205	Lodge Major Project	7
1301	Patrotic Programs	7
1401	Veterans' Service Events	8
1402	Veterans' Service Adopt-A-Vet Programs.	8
1403	Veterans' Service Army of Hope Programs	9
1501	Community Service Donations	9
1502	Health Fairs/Blood Banks	10
1503	Lodge Facilities Donated.	10
1504	Senior Citizen Programs	11
1505	Food Baskets.	11
1601	Public Service/Citizen Recognition	12
1701	Elks National Foundation Donations	12
1801	Drug Awareness Programs	13
1901	Auxiliary Organizations.	13
9999	Categories Not Covered.	14

Instructions

Keep this booklet at the Secretary's desk; immediately before or after the Lodge meeting when an activity committee makes its final report, a member of the Committee must enter the required figures in the appropriate page, category and columns with the assistance of the Secretary. Copies of the tear out Data Collection Survey form, found in the back of this book, should be made and given to each committee for reporting their activities. The District Deputy will verify that this booklet has been kept up-to-date on the annual Lodge visitation.

GENERAL:

For each program observed by your Lodge, complete Columns (A) thru (J) as accurately as possible for the **date on** which the event occurred, or if the program spanned several months, enter under the date the program closed. For those programs not specifically captioned, enter a brief description in the "CATEGORIES NOT COVERED" space and enter figures.

Columns (E) and (F): If accurate hours are not available, estimate as precisely as possible. Remember, if the committee consists of six Elks who worked as a group for an elapsed time of 3 hours, the total ELK HRS. should be "18" (6 times 3). DO NOT ENTER fraction or decimal parts of an hour – Round off to whole hours!

Columns (G) and (H): Actual or estimated mileage traveled in the preparation for or in the event itself. As in the hours above, if four people travelled a distance, the figures entered should be the product of number of people times distance traveled BOTH WAYS – ROUND TRIP! DO NOT ENTER fraction or decimal parts of a mile – Round off to whole miles!

Column (I): Cash value or equivalent of actual items (do not include hours or miles; include telephone charges or postage) used or given in a program. If in doubt about value of such items as used clothing or donated eyeglasses, contact other charitable organizations and ask what they or the IRS suggest as valuation guidelines. Door prizes, decks of playing cards for vets, etc. – you don't realize at first how much of value is donated in most programs without being tallied; take your time and get everything down; make notes as you go along. DO NOT ENTER dollar signs, cent signs, decimal points or cents – Round off to whole dollars and enter numbers ONLY!

Column (J): Cash, check or money order given or donated; if a U.S. Savings Bond, use purchase value – not value at maturity. DO NOT ENTER dollar signs, cent signs or decimal points or cents – Round off to whole dollars and enter numbers ONLY!

Example: Lodge held a bicycle safety and identification event in its parking lot on June 15, 2007 for 217 children with 6 Elks and 4 non-Elk Helpers who spend 7-¼ hours in planning and conducting the activity, making refreshments (value \$130.55 if purchased ready-to-eat), giving out a \$10 prize for the safest bicycle, with an Elk and a Helper driving 27-½ miles round-trip to obtain free bicycle safety booklets from the nearby Government office.

Enter information on page 2 as follows:

YOUTH ACTIVITIES (Includes Youth Week – 1004)

DATE	PROGRAM (A)	HEAD COUNT OF PARTICIPANTS (B)	— INVOLVEMENT —						CONTRIBUTIONS (DOLLARS ONLY)		1 0 0 4
			# ELKS (C)	# HELPERS (D)	ELKS HOURS (E)	HELPERS HOURS (F)	ELKS MILES (G)	HELPERS MILES (H)	NON-CASH (EST. VALUE) (I)	CASH— (J)	
6/15/07	* Bicycle Safety Program	217	6	4	44	29	28	28	131	10	
ANNUAL TOTAL		217	6	4	44	29	28	28	131	10	

In this example, if no other Youth Activities events were held during the year, these figures are carried down to the "ANNUAL TOTAL" line in the book and on the Grand Lodge Report (Page Two – Side One). If there are more programs for which there are insufficient spaces than the booklet provides, it may be necessary to insert an extra sheet in the book upon which figures should be entered in the same format as the regular pages. **NOTE: Programs should be placed in the most applicable main category, however, if a program does not fit a specific category, it should be listed under "CATEGORIES NOT COVERED" – Section 9999. Lodges may choose to identify these miscellaneous programs internally by a computer based identifier and total those for entry into the book and on the Annual Report at the end of the year.** Likewise, if there are multiple entries for one month in the same category (having a single computer-entry number), the figures must be combined in the booklet. Exact figures should be used if available; otherwise estimate as accurately as possible. Upon receipt of the Annual Report forms at the end of the Lodge year, the Secretary should total the columns for all categories and enter the totals on Page Two (both sides) of the Annual Report, to be returned with Page One and the per capita dues. Return the original to the Grand Secretary with copies to the PGER Sponsor AND the STATE Government Relations Chairman.

State Association Charitable Reporting Guidelines

The following is a guideline for all State Association Officers, Committee Members, District Officers and Association Members in general to help in uniformity of reporting. On, or before, May 1st of every year the State Associations must fill out page two of the annual report form listing all donations, hours, expenses and mileage, from Elks and non-Elks, and forward same to the Grand Secretary, with copies to the State Sponsor and State Government Relations Chairman.

It is hoped that this list will assist in the reporting and that all State Associations will therefore be reporting the same items nationwide. These suggested categories are not intended to be the only reported details as every State Association may have other entries to report as well. They will serve as a starting point and can be added to, according to need:

1. Total mileage to and from functions, meetings, Lodge visits and all other Elk involved visitations, of a charitable nature.
2. Total hours spent traveling to meetings, functions, Lodge visits, etc. for charitable purposes.
3. Total hours spent planning for, working on and attending above mentioned events.
4. All Elk related long distance phone charges and postage for charitable purposes.
5. Major Project income and budget amounts not reported by individual Lodges.
6. All charitable donations at the District or State level.
7. All out-of-pocket monies or Association supplied budget funds expended for charitable purposes.
8. Monies collected from charitable fund raisers.
9. Miscellaneous items as required.

It would be beneficial to report these items on a quarterly basis to your State Secretary and the final reporting to be done prior to April 15th. This will allow the State Secretary time to compile the report and submit to the Grand Secretary before the deadline.





Data Collection Survey of Volunteer, Youth, Charitable and Community Service Programs

Committee: _____

Date: _____

- (A) Program: _____
(B) Number of Participants []
(C) Number of Elks []
(D) Number of Helpers []
(E) Total Elk Hours []
(F) Total Helper Hours []
(G) Elk Miles []
(H) Helper Miles []
(I) Non-Cash Contributions []
(J) Cash Donations []

Column (A) Describe Program
Columns (B) thru (D) Count individuals — not couples, teams or groups.
Columns (E) and (F) Indicate total hours — If 6 Elks worked 6 hours (6 x 6 = 36 total hours)
Columns (G) and (H) Mileage traveled in preparation for an event itself. (Number of people times round trip miles.)
Column (I) Cash value of contributions including hall donations, food, band, clothing, bingo, parties, gifts, eyeglasses — Do not include hours or mileage.
Column (J) Actual cash, checks, money orders or purchase value of savings bonds donated.

Submitted by: _____

Must be completed and returned to the Secretary by the meeting following the program.

Elks Care — Elks Share



Data Collection Survey of Volunteer, Youth, Charitable and Community Service Programs

Committee: _____

Date: _____

(A) Program: _____

(B) Number of Participants

(C) Number of Elks

(D) Number of Helpers

(E) Total Elk Hours

(F) Total Helper Hours

(G) Elk Miles

(H) Helper Miles

(I) Non-Cash Contributions

(J) Cash Donations

Column (A) Describe Program

Columns (B) thru (D) Count individuals — not couples, teams or groups.

Columns (E) and (F) Indicate total hours — If 6 Elks worked 6 hours (6 x 6 = 36 total hours)

Columns (G) and (H) Mileage traveled in preparation for an event itself.
(Number of people times round trip miles.)

Column (I) Cash value of contributions including hall donations, food, band, clothing, bingo, parties, gifts, eyeglasses — Do not include hours or mileage.

Column (J) Actual cash, checks, money orders or purchase value of savings bonds donated.

Submitted by: _____

Must be completed and returned to the Secretary by the meeting following the program.

“Elks Care — Elks Share”