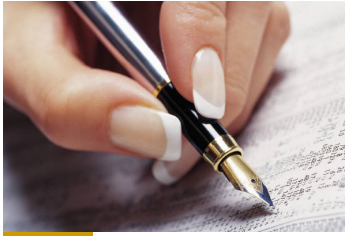




ASSURED LIFE  
ASSOCIATION

## CHAPTER REPORTING HINTS



Reporting Due  
March 31, 2021

### Quick Tips

- Gather your information first.
- When asked for a number-like the number of hours-type or write one whole number only. Type or write 1, 2, 3, etc. Do not type or write 1.5 or 1 1/2 or 2-3.
- If not sure of an answer, use your best guess.
- Do not leave a question blank.

We want as many chapters as possible to complete the annual reporting online. **It's easy and less time consuming than the paper forms, especially if you pull your information together before you start input.** You will find the various reports on our Website;

<http://assuredlife.org>

When you get to our website, click on the Chapter Leaders link at the top of page. This will take you to the Chapter Leaders page and the Annual Reporting link.

Once you get to the Chapter Annual Reporting page you will find that each report has its own link. All 3 reports must be completed.

**If you have any trouble with the website reporting forms, please feel free to call Jerry Christensen at (800) 777-9777, ext. 3820 or on his cell at (303) 908-4446. His email address is [jlc@assuredlife.org](mailto:jlc@assuredlife.org). If he is not available by phone, please leave a**

**message as he will call you back.**

### A Couple of Hints:

First—Although it is easy to do out of habit, **DO NOT HIT YOUR ENTER KEY** when completing the online reports. This actually submits what you have entered thus far and your data is lost.

Second—If you want a copy of your online submission, **PRINT BEFORE YOU HIT THE SUBMIT button. If you forget, the home office can provide you a copy of your submission for your files.**

Here are some more **quick tips** to keep in mind as you begin completing the Chapter Reporting; especially the Chapter Report/Survey.

1. Glance through the reports to see what information is necessary and gather that information together before you start.
2. When the question asks for a number or average of a number, record one whole number rather than a

range. For example, for average attendance, record 25 rather than 20-25. The same goes for questions regarding hours. Record 2 rather than 1-2. **For reporting hours, do not put "hours" or "hrs" behind your number. Just the whole number, please.**

3. If you are not sure of the answer, use a best guess. For example, the monetary value of food collected during a food drive. Use an average price per pound and multiply by the number of pounds collected.
4. If the answer to a question is "NO", please answer "NO" and go to the next question, or category, rather than leaving the question blank.



## Chapter Activity Report/Survey

There have been no **changes to the annual reports for 2021.**

The Chapter Report is once again in a survey style format for 2021. You may have to estimate some information requested (total volunteer hours spent on specific projects, for example). Do the best you can and **call Jerry Christensen with any questions.**

**For the question regarding social members,** if you report that your Chapter does have social members, **please record the number of social members; even if you have to estimate.** We get a lot of reports that leave it blank but report “YES” for social

members.

**Fraternal Business & Social Activities/ Events: No changes have been made to this section.** We are asking for the number of business meetings separate from the number of social events/activities. **If you combine business meetings with social events or programs, record the time spent and average attendance for the business meetings separate from the time spent and average attendance for the social event.**

**Community Service Activities or Events:** For each of the major community service categories, any amount do-

nated to an organization in conjunction with an event should be reported on the Financial Report.

For each of the major community service categories, other than donations, we ask that you report the amount the Chapter spent on putting on the event (printing of promotional flyers, supplies for the service event, food and refreshments for volunteers, etc.)

**If the answer to a question for a specific category is NO, DO NOT LEAVE THE CATEGORY BLANK. Please select NO and move on to the next category.**

If questions come up regarding how to handle an event or hours, call Jerry at 800-777-9777, ext 3820 or on his cell at 303-908-4446. If he doesn't answer either phones, please leave a message and he will call you back. You can also email him at [jlc@assuredlife.org](mailto:jlc@assuredlife.org).

## Financial Report

On the Financial Report, there is an **additional line item under the Income Section labeled “Member Donations to Charity Received Through Local Chapter.”** The purpose of this line item is to record members' monetary donations for a community service project in place of making an in-kind donation or volunteering for the event. For example, if your Chapter has a member food drive and instead of bringing food items to donate, a member donates cash, this amount should be rec-

orded as income under “Member Donations to Charity Received Through Local Chapter.” The amount is also reported under Expenses of the Chapter for “Total Donations to Non-Profit Organizations” along with any Chapter Funds donated.

