



# How to TU

## Filing Your Annual Activity Report

The primary way our organization gauges chapter and council activity and tracks the overall financial standing of TU is to collect Annual Activity Report statements from each chapter and council. These statements are filed electronically and are available in Leaders Only Tools Section of the tu.org website.

The Annual Activity Reports are filed for the previous fiscal year and are available for filing for 45 days after the end of the fiscal year. The TU fiscal year runs from April 1 through March 31, so your chapter or council report should be filed from April 1 through May 15 annually, reporting on the activity of the preceding year.

The Annual Financial Report may be filed by any officer or director of the chapter or council, but must be reviewed with your full board prior to submission.

### HOW TO FILE THE ANNUAL ACTIVITY REPORT

#### Step 1) Login at [www.tu.org/login](http://www.tu.org/login)

Login using the email address connected to your TU membership – once logged in, click the orange “Leaders Only” button. If you have forgotten your password, click the “Forgot your password” link. If you still have trouble logging in, [contact your Volunteer Operations Staff](#) for support.

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### Login to Your TU Account

Please login to your TU account to:

- Connect with the Online Community forum
- Update your contact and member information
- Access the Leaders Only tools for volunteer leaders

**Login**

Email address  
jyates@tu.org  
 Remember me

Password  
\*\*\*\*\*

[Forgot your password?](#)

**Don't have a login?**

TU accounts are for current, active members and provide access to a range of ways for you to connect with fellow members and volunteers and manage your membership. Renew your membership at [www.tu.org/renew](http://www.tu.org/renew) or join as a new member by clicking the button below.

Join Trout Unlimited Renew Your Membership

Login

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Visit the online Tacklebox for more tools, tips, tricks and tactics – [www.tu.org/tacklebox](http://www.tu.org/tacklebox)



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### Step 2) Open the “Activity Report” to begin filing

Once in the Leaders Only Section, choose the “Council & Chapter Resources” option from the top navigation menu, navigate to your chapter or council and click the “Activity Report” link.

The screenshot shows the Trout Unlimited website interface. At the top, the navigation menu includes 'HOME', 'COUNCIL & CHAPTER RESOURCES', 'OTHER RESOURCES', 'RETURN TO TU.ORG', and 'LOGOUT'. Below the navigation, there are two dropdown menus for 'Choose Council' (set to '9007 - Connecticut') and 'Choose Chapter' (set to '258 - Mianus'). A list of links is displayed, with 'Activity Report' links circled in red under both the Council and Chapter sections. A video player on the right shows a 'Welcome - New LOS' message. Below the links, there is a paragraph of text explaining the purpose of the activity report and how to access resources.

### Step 3) Begin filing your FY2021 Activity Report

After navigating to “Activity Report” you will see a blue button option to “Create New Activity Report” – click that button to begin filing your report. If you had previously filed or entered data for the prior fiscal year, you will see that report listed and can click the eye icon to view the filing.

The screenshot shows the 'Chapter - Annual Activity Reports' page for Chapter 258 - Mianus. A blue button labeled 'Create New Activity Report' is circled in red. Below the button is a search bar and a table of activity reports. The table has columns for Year, Chapter, Submitted, and Status. A single entry is shown for the year 2020, submitted on 01/19/2021, with a status of 'Approved'. A blue button with an eye icon is next to the entry. At the bottom, it says 'Showing 1 to 1 of 1 entries' and has navigation buttons for 'Previous' and 'Next'.

Year	Chapter	Submitted	Status
2020	258 - Mianus	01/19/2021	Approved



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### Step 4) Complete the Annual Activity Report

Complete the approximately 60 financial and activity questions in the report. If your treasurer information at the top is incorrect, navigate to the “Update Chapter Leaders” option under the “Council & Chapter Resources” top navigation menu item to change the information on your treasurer.

**Chapter - Annual Activity Report - FY2021**

Chapter Name: 258 - Mianus  
EIN: 510225098  
Member Count: 581  
Treasurer Name: Mr. James A. Bakal  
Treasurer Phone Number:  
Treasurer Email Address: jbakal@mianustu.org

Note: To avoid any data loss, please save the form often, by clicking save at the bottom of the form.

Print

### General Financial & Accounting Questions

Is your chapter or council separately incorporated in your state?

Does your chapter or council own real estate or hold conservation easements?

Did your chapter or council engage in any legal action or litigation?

Does your chapter or council have an endowment fund?

Did your chapter or council employ full or part-time staff?

Did your chapter or council compensate officers or directors (other than reimbursements)?

Did your chapter or council pay a contractor or consultant more than \$599?

### Step 5) Click “Save” to keep editing the report, click “Save & Submit” when completed

Be sure to click “Save” occasionally to prevent lost work. When your report is complete and has been reviewed by your full chapter or council board, click the “Save & Submit” button to file your final report. If you need to make edits after clicking “Save & Submit” [contact your Volunteer Operations Staff](#).

### General Board Business Practices

How many chapter or council board meetings did you hold in the fiscal year?

How many of your elected chapter or council officers and directors have served:

0-4 years

5-9 years

10-14 years

15+ years

We have established strategies and goals for creating a culture such that one’s identity (including race, gender, sexual orientation, ability, age, etc...) has no influence on how they fare within the chapter or council.

We seek individuals from various backgrounds for board positions on our chapter/ council in order to represent the demographics of our community at-large.

Approximately how many members of your chapter or council board of directors identify as women?

Approximately how many members of your chapter or council board of directors identify as people of color?

Save Save & Submit