

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 <u>www.tu.org/login</u>

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, <u>contact your Volunteer Operations Staff</u> for support.



Visit the online Tacklebox for more tools, tips, tricks and tactics – www.tu.org/tacklebox



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.

| | | HOME COUNCIL & CHAPTER RESOUR | CESS OTHER RESOURCES + RETURN TO TU.ORG LOGOUT |
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| | Choose Council 9007 - Connecticut Council Roster Bectronic Documents Email Members Update Council Leaders Membership Changes Update Council Information Activity Report | Choose Propte 58 - Mianto Charter Rome Bectroric Documents Email Members Update Clotter Leaders Membertin Changes Update Docter Information Activity Secont | About This Menu Option: Upload and store your important documents including bylaws, strategic plans, insurance certificates and more for easy access by all of your current and future board members. |
| your annual acti download variou please <u>contact</u> vy resources are no to your state Con have access to yo | vity report, make chapter or leadership ch is membership reports. If at any time you olunteer operations staff or your chapter of w accessed from the top menu. As a Cour uncil and all associated Chapters. If you a our chapter tools and resources only. | anges, as well as view and have questions or comments, re council leader. All tools and cil Leader you will have access re a Chapter Leader you will | |
| OTHER VOLUN | TEER 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.

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|--|---------------------|--------------|---------------|-------------------------------|----------------------------------|
| Chapter – Annual Activity Repor Chapter: 258 - Mianus | | rts | Search | | |
| | Year | Chapter | Submitted | ▲ Status | • |
| ۲ | 2020 | 258 - Mianus | 01/19/2021 | Approved | |
| Showing ' | 1 to 1 of 1 entries | | | < Previous | 1 Next > |

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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.

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|-----------------|--|------------------------------------|---|
| | Chapter – Annual Activity Report - FY202 | 1 | |
| | Chapter Name: 258 - Mianus EIN: 510225098 Member Count: 581 Tressurer Name: Mr. James A. Bakal Tressurer Phone Number: Tressurer Email Address: jbakal@mianustu.org Note: To avoid any data loss, please save the form often, by clicking sav Print | e at the bottom of the form. | |
| | General Financial & Accounting Question | <u>15</u> | |
| | Is your chapter or council seperately incorporated in your state? 0 | | |
| | Does your chapter or council own real estate or hold conservation easements? $m{0}$ | | |
| | Did your chapter or council engage in any legal action or litigation? 0 | | |
| | Does your chapter or council have an endowment fund? 0 | 0 | |
| | Did your chapter or council employ full or part-time staff? | 0 | |
| | Did your chapter or council compensate officers or directors (other than reimbursements)? | 0 | |
| | 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" <u>contact your Volunteer Operations Staff</u>.

| <u>(</u> | General Board Business Practices 🛛 | | |
|--------------|---|--------------------|--|
| н | low many chapter or council board meetings did you hold in the fiscal year? $oldsymbol{0}$ | | |
| н | low many of your elected chapter or council officers and directors have served: | | |
| 0 | -4 years | | |
| 5 | -9 years | | |
| 1 | 0-14 years | | |
| 1 | 5+ years | | |
| W g ci | Ve have established strategies and goals for creating a culture such that one's identity (including race, ender, sexual orientation, ability, age, etc) has no influence on how they fare within the chapter or ouncil. | 0 | |
| V | Ve seek individuals from various backgrounds for board positions on our chapter/ council in order to epresent the demographics of our community at-large. | | |
| A | pproximately how many members of your chapter or council board of directors identify as women? | | |
| A | pproximately how many members of your chapter or council board of directors identify as people of olor? | | |
| | | Save Save & Submit | |

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