# Women of Today Reporting

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## Introduction

Reporting is an important aspect of being a Women of Today chapter. Various reports serve different purposes which are detailed below. Reports help your leaders on Executive Council understand the progress toward statewide goals and provide a way to stay in touch with chapters.

The overview section goes over the overall process of reporting; the details section gives more information on each specific report; and the reporting tips and ideas section offers some ideas to help your chapter successfully submit reports. At the end you can also find a handy reporting flowchart that summarizes reporting as well as a sample project report form.

## What is a Project?

A project can be any of the activities your chapter participates in. Some examples include:

- Activities that raise money or gives time to another organization
- Fundraising for your own chapter for ways and means
- Chapter socials and membership events
- Personal enrichment course or a certification night

## Why Report?

Reporting is important for our organization. It offers an opportunity for chapters to share ideas and concerns. In addition it allows the state organization to sum together all the amazing things that chapters do in their local communities and show the world what an amazing organization we are.

## Reporting Timeline

This is an example of how reporting can be handled in a chapter.

### After each Project

The chair of the project should ensure that the information about the project is captured. This likely includes the following:

- Fill out a project report form and give this to the Local Program Manager (LPM), Programming Vice President, State Delegate and Secretary. This report should include organization served, hours worked (including planning), dollars raised, etc. The LPM and State Delegate use this report to create her trimester reports, the Programming VP may include this in a project book for the chapter, and the secretary may use this for the minutes. There is a sample project report at the end of this document.
- Give a recap at the next general meeting (include hours worked, dollars raised, etc) and in the next chapter newsletter.
- Submit expenses to treasurer for reimbursement as approved.
- Ensure that a transmittal is submitted for any dollars donated – including dollar value of in-kind donations. This may not be done by the project chair, but the project chair will need to provide this information. Find more details about transmittals below.

### Each Month

- Chapter President submits a report and includes a high level of information about projects (what we have done and what we have planned).
- See details about the chapter president report below.

### Each Trimester

- At the end of each trimester, additional reports are submitted by the Local Program Manager and State Delegate. In addition, chapters may also submit SUCCESS at the end of each trimester.
- The deadlines for these reports are typically a few weeks prior to convention. You can find these dates in the Chapter Information Packets (CIPs) and on the state calendar.
- LPM or Programming VP should submit an LPM report which includes all projects in that area during the trimester. This is how the state organization tallies all service hours worked by the organization each year. You can learn more about LPM reports below.
- The chapter's State Delegate also submits a report each trimester including recent projects, concerns and membership information. You can learn more about the State Delegate report below.
- Someone in the chapter also submits SUCCESS each trimester. SUCCESS isn't a report, but it includes information from all the other reports submitted by a chapter so it is included. You can

learn more about SUCCESS below.

# Details

## Transmittals

Transmittals are Important!
Transmittals are the only way the organization can sum together all the great things every chapter is doing. A small monetary donation, a huge fundraiser, or donations of items adds up over the year. A transmittal is free to submit online and only takes a minute of your time. Read more below or ask the state treasurer any questions that are not addressed here.

**What are they?**

- A transmittal is the 2-part form used to track monies raised in External programming areas only.
- Dollars donated to other organizations (not ways and means) as well as the monetary value of in-kind donations are reported on transmittals.

**When are they used?**

- Every time your chapter runs a project and/or makes a donation of money or items, a transmittal should be sent with the value of what was donated.
- A deadline for each trimester is on the state calendar – typically 3 weeks prior to convention.

**Where is this report?**

- The electronic version can be found in the Book of Forms under form category "Chapter: Support".
- Paper Forms available from the state treasurer or Chapter Service Center.

**Examples of projects needing a transmittal**:

- A donation can be clothing or other items donated to a shelter or camp; donations of items gathered for our priority project; books donated to a library; flowers planted in your community park; food shelf donations; donations to a foundation such as March of Dimes or Relay for Life; a Halloween party that you sponsor & pay for everything and do not charge to attend; donations supporting your local girl/boy scout troop; sponsoring a family or giving program at Christmas or Thanksgiving; monetary donations to school programs or projects.

**How are they used?**

- The white copy is sent to the state treasurer; the yellow copy is retained for chapter records. You may also enter them online (see section on when online transmittals can be used below).

**Where do I send the money?**

- If the donations were made locally, there would be no check to send.
- If you have raised money for a foundation, you may send the check directly to the foundation or to the state treasurer.

- All other checks are sent to the state treasurer with the transmittal. Make sure the check is made payable to the Minnesota Women of Today!

**When can I use the Online Transmittals?**

- If you need to send in a check, please use a paper transmittal.
- The online transmittal submission is for those donations that have already been sent to an organization or foundation. This donation can be a local donation.
- The online form can be found by clicking the member menu on the website, choosing Book of Forms, and selecting the Chapter: Support form category.

**Why should we send them in?**

- Transmittals help track the dollars donated by our chapters. By compiling the information from these "official receipts", we are able to see how much money was donated statewide. Careful records are maintained by the state treasurer to ensure funds are not counted twice.

**Who should fill them out?**

- It could be the project chair, the treasurer, the External Programming Vice President, or someone else. Just ensure all chapter members know the procedure for submitting transmittals in your chapter.
- Each chapter will determine who will be responsible for filling out the transmittals, i.e. the treasurer or project chair. Develop a system that works for your chapter, whether it be completing the transmittal as soon as the project is finished, or completing transmittals at the end of the trimester. Please note the treasurer will need transmittals early in the third trimester - please check the state calendar for deadlines. However, as a PVP or LPM you can check to ensure transmittals have been sent and/or offer to help.

**What is the deadline?**

- There is a deadline published in the CIPs and state calendar for transmittals each trimester. You can submit them for any trimester up to the final deadline in May to be counted for that year.

## Local Program Manager (LPM) Reports

**What are they?**

- The LPM report serves as a summary of the programming activity for your chapter in the previous trimester including service hours, projects, certifications, questions, etc.
- LPM reports are the main communication tool between LPMs and the District (DPM) and State (SPM) Program Managers.

**When is this used?**

- These reports are submitted at the end of each trimester. You can find the deadline in the state calendar or in the Chapter Information Packets (CIPs).
- You can always submit for previous trimesters until the 3rd trimester deadline in May.

**How is this used?**

- The hours reported in the LPM reports are added together and reported at each convention. Only hours reported can be included so it is important that LPM reports are submitted.

- LPM reports serve as a way for DPMs and SPMs to track chapter activity related to their goals for the year.
- They also serve as an opportunity for LPMs to communicate any questions or concerns to their DPM and SPM.
- Please include the e-mail address of your chapter State Delegate and your DPM (if you have one) when submitting the report.

**When should I use the online or paper versions of this report?**

- The option to use the online or paper version of this report is up to you. Both are available on the website under Book of Forms.

**Why should we send this in?**

- For external programming areas, LPM Reports are where the service hours for the work each chapter completes are reported. At the end of the year, the programming vice presidents on the state staff compile the service hours from every chapter together and present this total to the state president.
- For some internal programming areas, numbers of certifications are reported. The DPM and SPM have a goal for a number of certifications to achieve in the year and this assists their tracking.

**Who should fill this out?**

- Typically the LPM for the area fills out the report. If there is no LPM for an area, then the Programming Vice President would submit this report.

**Where is this report?**

- The electronic and printable versions can be found in the Book of Forms under form category "Chapter: Management".

## Chapter President Report

**What is this report?**

- This report contains information about your chapter – new members, renewals, chapter activities, concerns, etc.

**When is this used?**

- These reports are submitted at the end of each month. You can start sending them in at any time, even if you have never submitted one before. The deadline is typically the last day of the month.

**How is this used?**

- These reports are read by the state president, district director, chapter management vice president, and membership vice president. Some examples of how this information is used are:
    - Membership information is checked against the information received at the chapter service center to ensure all new members and renewals were sent in.
    - Concerns are reviewed and help is provided as needed.

**When should I use the online or paper versions of this report?**

- The option to use the online or paper version of this report is up to you. Both are available on the website under Book of Forms.

**Why should we send this in?**

- This report serves as an important communication tool between the chapter presidents and the state president. Since the state president has so many chapters to talk to throughout the year, this offers an extra opportunity for communication.
- If your chapter needs any assistance regarding conflict, membership, recruiting, retention, activation, or anything – this report gives you a chance to voice your concern.

**Who should fill this out?**

- This report should be filled out by the chapter president.

**Where is this report?**

- The electronic and printable versions can be found in the Book of Forms under form category "Chapter: Management".

## State Delegate Report

**What is this report?**

- The State Delegate report includes a variety of information about the chapter including membership details, recent chapter events, and participation in state and district events for the trimester that just ended.

**When is this used?**

- These reports are submitted at the end of each trimester. You can find the deadline in the state calendar or in the Chapter Information Packets (CIPs).
- You can always submit for previous trimesters until the 3rd trimester deadline in May.

**How is this used?**

- This report is used as another way to communicate between the chapters, the district director, and the state executive council.

**When should I use the online or paper versions of this report?**

- The option to use the online or paper version of this report is up to you. Both are available on the website under Book of Forms.

**Why should we send this in?**

- This report offers you a chance to share ideas and projects in your chapter as well as an opportunity to share concerns you may have.

**Who should fill this out?**

- This report should be completed by the state delegate. If your chapter does not have a state delegate, the chapter should decide who would be the best person to gather the details and submit the report.

**Where is this report?**

- The electronic and printable versions can be found in the Book of Forms under form category "Chapter: Management".

## SUCCESS

**What is SUCCESS?**

- SUCCESS is a unique chapter management tool that serves as a guideline for running a healthy chapter. It serves as a checklist to ensure that your chapter is well rounded and taking advantage of all that Women of Today has to offer.
- Chapters can use SUCCESS as an internal tool – a checklist for the board to review and utilize. It can also be submitted at the end of each trimester where the points will be totaled and verified and chapters compete to receive the top spot.
- This isn't technically a report, but since information from the LPM and State Delegate reports are used for filling out the SUCCESS form, it is included here.
- SUCCESS includes details about membership, meetings, projects, and chapter management.
- At each convention, there is a SUCCESS march which recognizes chapters who participated in SUCCESS.

**When is this used?**

- SUCCESS is submitted at the end of each trimester. You can find the deadline in the state calendar or in the Chapter Information Packets (CIPs).
- You can submit any trimester, even if your chapter has never participated in SUCCESS in the past.

**How is this used?**

- As mentioned above, this is a chapter management tool as well as a competition.

**When should I use the online or paper versions of SUCCESS?**

- There is an online and paper version of this report. Please review the guidelines provided by the Records and Recognition State Program Manager for full details on submitting SUCCESS for competition.

**Why should we send this in?**

- You must send in SUCCESS if you would like to compete.

**Who should fill this out?**

- This may vary from chapter to chapter, it may be the president, records and recognition LPM, state delegate, or someone assigned to do SUCCESS.

**Where is this "report"?**

- The printable version can be found in the Book of Forms under form category "Chapter: Management".

## Reporting Tips and Ideas

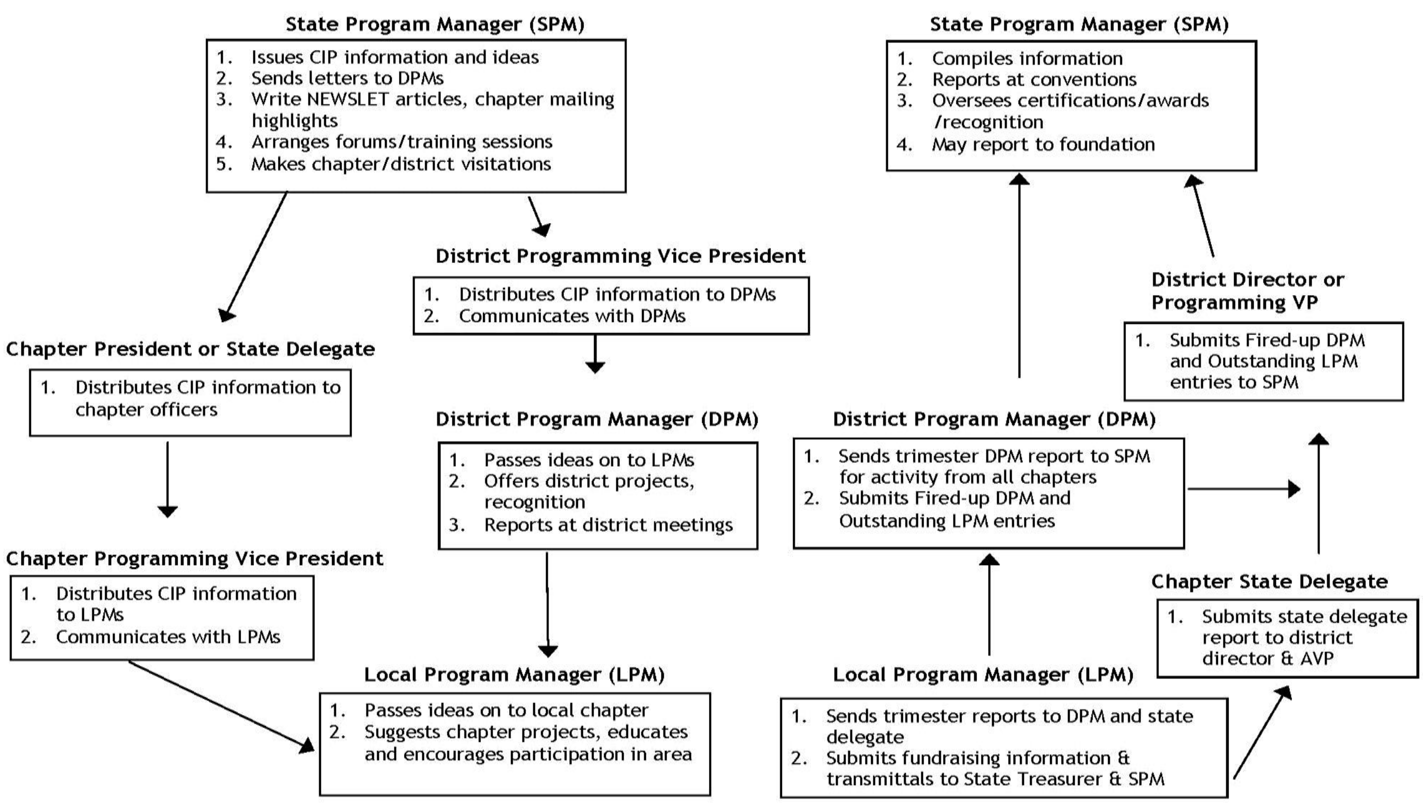
Every chapter does their reporting a bit differently. Below are some examples of ways to ensure that your chapter reports are sent in:

- E-mail or phone call reminders to those who need to submit reports.
- Add the reporting deadlines to your chapter calendar.
- Utilize a project report for each project. These should include the project details, dollars raised, hours worked, and any contact information needed to run this project in the future. See a sample Project Report below.
- Have a checklist for project chairs and include submitting a transmittal and a project report. An example "How to be a Successful Co-Chair" checklist from the MNWT website can be found in the Book of Forms under category "Chapter: Support".
- Some chapters also host a "reporting party" near the end of the trimester to gather project reports, submit transmittals, gather substantiating materials for SUCCESS, and submit reports. Get together at someone's home or a coffee house. If you have wireless internet access, you can even submit the reports online. You could also extend one board meeting each trimester to include some time for reporting.
- Have copies of each report available at each chapter meeting and make notes on anything relevant. Then at the end of the trimester, use those notes to submit your report.
- Talk about reporting in your chapter. Help chapter members understand why it is important.
- Document how reporting is done in your chapter – who submits transmittals, who receives project reports, how are project reports saved (electronically, in a notebook, etc) so that everyone in the chapter knows how it works.

## Reporting Flowchart

This flowchart shows how information flows from the State Program Manager (SPM) to the District and Chapter as well as how chapter information is sent back to the SPM. Note that in your chapter, different individuals may do these tasks.

**Reporting Procedure and Communication Flow**




**Local and District Program Managers are the key link to reporting information to the state program managers. The SPM wants to know what your chapter and district is doing. Please keep them informed!**

# Sample Chapter Project Report Form

Please bring at least three copies to the meeting (one for the secretary, one for the president, and one for the project book).

Project Name:

Programming Area:

Date of Project:

Short Project Description:

Names(s) of chairperson(s):

Service hours/manpower (include planning time, committee meetings, cleanup, etc):

Money raised/spent:

Date transmittal was sent (if donations were made):

Names of people who worked on project (or attended event):

Number of members/guests that attended the project:

Person filing report:
Please provide a copy of any additional documentation for the chapter's project book.