

2020  2021

**CHARITY**

**RECORDS**

**WORKBOOK**

To assist with online submission of Local Lodge Volunteer,  
Youth, Charitable and Community Service Programs at  
<https://www.elks.org/grandlodge/charity/default.cfm>

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 Office of the Grand Secretary**

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# INSTRUCTIONS

Keep this workbook 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 its activities. The District Deputy will verify that this workbook has been kept up-to-date on the annual Lodge visitation.

## GENERAL:

For each program observed by your Lodge, complete Columns (A) through (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 during the event itself. As in the hours above, if four people traveled 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, 2020 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)	
6/15/2020	Bicycle Safety Program	217	6	4	44	29	28	28	131	10	
<b>ANNUAL TOTAL</b>		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. At the end of the Lodge year, the Secretary should total the columns for all categories and enter the totals in the Annual Report. Lodges are reminded that they are required to file the report to the Grand Secretary at <https://www.elks.org/grandlodge/charity/default.cfm>. The deadline is on or before May 1.

# 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 1 of every year, the State Associations must fill out page two of the online Annual Report form listing all donations, hours, expenses and mileage, from Elks and non-Elks. The form can be found at <https://www.elks.org/members/statesecys/StateCharityReport.cfm>.

This list hopefully will assist in the reporting and enable all State Associations to report 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 Elks-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 Elks-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 fundraisers.
9. Miscellaneous items as required.

It would be beneficial to report these items quarterly to your State Secretary with the final reporting before April 15. This will allow the State Secretary time to compile the report and submit by May 1 to the Grand Secretary at the <https://www.elks.org> link listed above.



*“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”





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 [ ]
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(I) Non-Cash Contributions [ ]
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Column (A) Describe Program
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Submitted by: \_\_\_\_\_

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

“Elks Care — Elks Share”







