

Sections and Chapters Annual Report Checklist

Here's what you will need to complete the annual report:

Officers and Directors

List of section/chapter officers including:

- Chair, Vice-Chair
- Treasurer
- Section/Chapter Membership Chair
- Secretary
- Student Chair/Coordinator
- YP Chair/Coordinator
- Education Chair/Coordinator
- All Directors

Programs and Services to Members

Details on including the number, date of event, number attended for all of the following:

- Conferences or workshops
- Technical events
- Courses
- Networking events
- Webinars
- Board meetings

Education

- Scholarships awarded and total \$ amount
- Volunteer Leader Development
- Board or officer training
- Attendance at Leadership Training Academy

Membership

Membership statistics will be provided on the Annual Report page with year-end figures for the past two years, broken down by section and chapter. You will also need:

- Section or chapter membership award winners (you would have been contacted about this)
- Membership drive details including communication/promotion and results
- Student Chapters your chapter or section supports, Student Chapter Profile forms, and Outstanding Student Chapter Award nominations if applicable
- Student officer and faculty advisor names and emails

Communication and Public Outreach

- Section website address
- Frequency of newsletters and/or regular member communications
- Social media page names
- Name and email of those who manage the social media pages
- Participation in public outreach events including job fairs, Scouting Jamboree, presentations at schools, ERG workshops, etc.

International Association Participation

- Numbers and names of section/chapter members who are members of the International Board of Directors, Council or Committee Chairs
- Participation at Section and Chapters Council meetings
- Section and Chapter Bylaws if updated

Financial Activity

Total cash reserves for checking and savings accounts and investment balances

- Income earned through meetings, educational events, social events, scholarship contributions, local dues collected, interest, donations and other
- Expenses incurred for meetings, educational events, social events, scholarships awarded, operating/admin expenses, donations, and other
- Insurances
- You will need to decide whether or not you wish to purchase additional Directors and Officers coverage for your section or chapter.