

President's Annual Report Form

2014 Term Year



Name of Chapter: _____

President Reporting: _____

This report covers chapter activities for the term year (November 1, 2013, through October 31, 2014) and should be submitted to the CMAA Chapter/Member Services Department no later than January 1, 2015, for chapter records.

1. Please review your chapter boundaries. If there has been a change, please state the new chapter boundaries and include chapter minutes verifying the change.

2. If there are regions within the chapter, please list names and boundaries:

3. If amendments were made to your chapter's bylaws this year, include a copy of your chapter's current bylaws. (*Chapter bylaws must be in compliance with the CMAA Bylaws.*)

4. In accordance with Article XII of the CMAA Bylaws, our chapter held at least four educational programs as part of its chapter meetings.

Yes No, please explain _____

5. All chapter meeting minutes should be sent to the National Headquarters within 15 days of each meeting. Rosters for all (Educational, Business and Social) meetings must be included with the minutes for proper credit to be given to participants. Check with your Managing Director or Chapter Secretary to verify that all chapter meeting minutes have been submitted.

I certify that our chapter record system is in use and the Managing Director or Chapter Secretary is submitting minutes as requested.

Yes No, please explain _____

6. Our annual chapter dues are: \$ _____

Dues include (check all that apply) Education Meals Other _____

7. Please verify that the following chapter leadership/management positions (as reported by the chapter and if applicable) have fulfilled their responsibilities as outlined via the online *Chapter Officer Resource Page* and should be awarded the proper Association Activity credits:

Officer/Director term start date: _____ end date: _____

- | | | | | |
|---|--|---|---|---------------------------------------|
| <input type="checkbox"/> Vice President | <input type="checkbox"/> Career Services | <input type="checkbox"/> Club Solutions | <input type="checkbox"/> Membership | <input type="checkbox"/> Technology |
| <input type="checkbox"/> Secretary | <input type="checkbox"/> Certification | <input type="checkbox"/> Education | <input type="checkbox"/> Public Relations | <input type="checkbox"/> Wine Society |
| <input type="checkbox"/> Treasurer | <input type="checkbox"/> Club Foundation | <input type="checkbox"/> Legislative | <input type="checkbox"/> Student Chapter | <input type="checkbox"/> Other _____ |

8. All chapters are required to file (as applicable) with the Internal Revenue Service:

- Form 990, "Return of Organization Exempt from Income Tax";
- Form 990-T, "Exempt Organization Business Income Tax Return";
- Form 1024, "Application for Recognition of Exemption under Section 501(a)"; and
- Form SS-4, "Application for Employer Identification Number."

I certify that the chapter has filed the required tax forms or is planning to do so.

Yes No, please explain _____

Please include your chapter's tax identification number: _____

9. The chapter has completed the required insurance and indemnification form from CMAA National Headquarters. (Please see attached.) Yes No

10. The chapter participated in the following Association initiative(s):

- Chapter of the Year
- Excellence in Education
- Idea Fair for Chapters
- Strategic Planning
- Chapters Collecting for Communities
- Auctions to Benefit The Club Foundation

11. The chapter publishes a newsletter:

Yes, published ____ times/year Online Printed No

12. The chapter has a website: Yes, the address is: _____ No

13. In accordance with the chapter visitation schedule each chapter receives a National Board Member visit at least once every other year. If applicable for the 2014 term year, the chapter met with:

Name: _____ Date of visit/meeting: _____

14. Please list any suggestions that would enable the National Headquarters staff to better assist you and the chapter officers/chairmen with your assigned duties.

I hereby verify that all information contained here is true and correct to the best of my knowledge.

Signed – 2014 Chapter President