Manual for Charitable Reporting

A Publication of the Florida State Elks Association

Published as a Companion Publication to the GL Government Relations Manual, and the Secretaries Charity Workbook
CHARITABLE REPORTING

A. CHARITABLE REPORTING IS ESSENTIAL
Charitable reporting is one of the keys to the very survival of our great Order. The Charity Statistics, once compiled, represent the only tangible, documentary proof of the total dollar value of all charitable work of Elks nationwide. These statistics show in dollars and cents just how much charitable work our Lodges account for in their jurisdictions, and this gives our Order tremendous leverage with our elected officials. The statistics, once compiled, are used to make sure local, state, and federal officials are aware of the tremendous positive impact the Elks are to their states, communities, and constituents.

Each year our Lodges and State Associations account for almost $400 million of documented charitable work nationwide. In 2020 that amount was $381,194,271. Because of our charitable reporting requirements, unlike any other organization, we have tangible documentary proof. The sad part is that only half of the work being performed by our Members and Lodges gets reported. **We do the work; why not get the credit!**

Therefore, it is essential that Members, Lodges and State Associations keep complete and accurate records of all the charitable work being done.

B. ACTIVITIES THAT MUST BE REPORTED

There is typically a lot of confusion concerning what activities must be reported. There really should not be any confusion; you simply report any time you spend, the miles you travel, expenses you incur, the value of items you donate (non-cash), and the cash contributions you make working on “charitable, patriotic, civic-minded or community related projects or activities.” Please keep in mind, ONLY charitable activities need to be reported. No records need to be kept for non-charitable committee work such as work done on auditing, membership, etc.

There are eleven (11) basic categories used for reporting. They are:

Youth Programs
Athletic Programs
Needy/Handicapped Programs
Patriotic Programs
Veterans Service Programs
Community Services Programs
Community Recognition
Elks National Foundation
Drug Awareness Programs
Auxiliary Organizations
Categories Not Covered

Within these (11) categories there are several subcategories as follows:

Youth Scholarships – Youth Programs
Student of Month/Year – Youth Programs
Scouting Programs – Youth Programs
Youth Activities – Youth Programs
Antlers Program – Youth Programs
Youth Athletic Programs – Athletic Programs
Hoop Shoot – Athletic Programs
Soccer Shoot – Athletic Programs
Special School – Needy/Handicapped Programs
Handicapped Programs – Needy/Handicapped Programs
Special Equipment Used – Needy/Handicapped Programs
State Major Project – Needy/Handicapped Programs
Lodge Major Project – Needy/Handicapped Programs
Vets Service Events – Veterans Service Programs
Adopt-a-Vet Programs – Veterans Service Programs
Army of Hope Programs – Veterans Service Programs
Community Service Donations – Community Services Programs
Health Fair/Blood Banks – Community Services Programs
Lodge Facilities Donated – Community Services Programs
Senior Citizens Programs – Community Services Programs
Food Basket Programs – Community Services Programs
Natural Disaster Relief – Community Services Programs
ENF Donations – Elks National Foundation
Donation by Lodge/State Assn. – Elks National Foundation

All total there are (29) “categories” for reporting and EVERY event/activity must be reported under one of the twenty-nine. Also, each event/activity can only be reported once, so choose the category/subcategory each event/activity best fits under. Your Lodge Secretary can help you choose if you are not certain which to report under.

C. WHO SHOULD REPORT?

Members. Event Chairs and Event Organizers.
Every Member should report anything they do individually for charity; however, generally the Event Chair or Event Organizer should report all time spent, miles traveled by volunteers, and expenditures and cash contributions for an event.

District, Regional and State Chairs of Charitable Committees.
Chairs of Lodge, District, State charitable committees should report their miles traveled and time spent attending committee meetings, DD clinics, VP clinics and any other meetings involving these charitable committees.

D. WHAT INFORMATION SHOULD BE REPORTED?

Information to be reported by Members Individually.
Members should keep track of time spent, miles traveled, non-cash contributions (i.e. expenses incurred) and any monetary contributions made when performing charitable, patriotic, civic-minded activities. This information should be given to the Lodge Secretary monthly.

Information to be reported by Event/Activity Chairs.
Event Chairs or Event Organizers should keep track of time spent, miles traveled, non-cash contributions (i.e. expenses incurred) and any monetary contributions made for each charitable, patriotic, civic-minded activity. This information must be entered by a member of the committee with the assistance of the Lodge Secretary immediately before or after the lodge meeting when an activity committee makes its final report.

Information to be reported on non-member Helpers.
Many times, our Members are assisted by their nonmember spouses, children, or other non-Elks in running the charitable events or working on our charitable endeavors. Please note, the same information
should be kept and reported for any non-Elks who helped.

**Reporting time spent in planning, setup, and cleanup for Activities.**
When reporting charitable activities, include time spent planning, organizing, shopping for, setting up or cleaning up after the event or activity as well as time spent holding the event.

**Reporting attendance at Grand Lodge and State Association Conventions.**
An Exalted Ruler or other attendee can report their attendance at the Grand Lodge and State Association Conventions, BUT ONLY for time where charitable committees and activities were discussed. The GL Government Relations Committee estimates that one half of the hours spent in business sessions at Grand Lodge and State Association conventions involve charitable committee work and reports. Therefore, it is believed you can account for the miles traveled to and from such conventions and one half of the hours spent in business sessions.

Also note, if any of your Members work a charitable booth at the conventions, such as for your State Major Project, Drug Awareness, Americanism, Youth Activities etc. they can report their travel to and from the conventions as well as time spent setting up, working at or breaking down the booth.

**OUR GOAL IS 100 PERCENT REPORTING!**
The goal is to have 100 percent of Members who are required to report, report 100 percent of their charitable activities. With your help we can meet that goal.

**E. INFORMATION ON FLORIDA ELKS (STATE) ONLINE REPORTING**

The following is published as a pop-up on the Florida State Elks Website ([www.flelks.org](http://www.flelks.org)) upon accessing the (State) online reporting landing page at [https://floridaelks.org/log-in-info](https://floridaelks.org/log-in-info).

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### Important Information About Florida Elks Online Reporting

1. These (State) online reports are sent only to the Florida State Elks Association (FSEA) in Umatilla.
2. This (State) reporting does NOT replace the Event/Activity reports that must be turned-in to your Lodge Secretary for recording in the Lodge’s Charity Workbook.
3. The Lodge Secretary must enter the records from the Lodge’s Charity Workbook into the National online reporting system through their Chicago Lodge Management System/Software (CLMS).
4. The (State) does not have access to CLMS nor do we use CLMS. At this time there is no way for the State system to talk to the National system which means Lodges must continue to report using both systems.
5. The information reported is the same for both the State & National systems.
6. The FSEA has compiled a Manual for Charitable Reporting which provides how-to information on reporting. You are advised to read it and make copies available to your members as it contains valuable insight on the reporting process and what should be reported. There are also forms to use to help keep track of what should be reported. Below are the links to the manual and the reporting forms.
7. There is a common misconception that miles and hours must be converted to dollars and those dollars entered on the form as (non-cash) contributions. This is incorrect and should not be done. The charitable value of miles and hours changes frequently so when reports are compiled that require that conversion it is done manually by the Grand Lodge Government Relations Committee. Members and Lodges should report miles and hours ONLY and should not report them as non-cash dollars.
**Reporting Form**

*For Use by Members & Committees to Track Multiple Events*

To Be Provided At least Monthly to the Lodge Secretary

Events/Activities Spanning Several Months may be Reported at the Conclusion of the Activity

<table>
<thead>
<tr>
<th>Event Date</th>
<th>Charitable Committee/Program Type</th>
<th>Program Name</th>
<th>Participant Head Count</th>
<th># Elks</th>
<th># Non-Elks</th>
<th>Elks Hours</th>
<th>Helper Hours</th>
<th>Elks Miles</th>
<th>Helper Miles</th>
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**Charitable Committee/Program Type** = Antlers, Americanism, Drug Awareness, Hoop Shoot, ENF, Parades, Youth Leadership, Scholarship, Soccer, Veterans, Youth, etc.

**Program Name** = Event Name or what you call the Program/Event

**Participant Head Count** = Individuals not Teams or Groups

**# Elks & # Non–Elks** = Count Each Individual Volunteer

**Elks Hours** = If two Elks work 6 hours on this event record 12 hours or 2 Elks x 6 hours

**Helper Hours** = If two Helpers work 6 hours on this event record 12 hours or 2 Helpers x 6 hours

**Miles** = If two Elks traveled 18 miles roundtrip to work this event record 36 miles or 2 Elks x 18 miles

**Non-cash** (DO NOT include the cash value of volunteer hours or charitable miles here) = The cash value of contributions including food/clothing/gifts donated

**Cash** (DO NOT include the cash value of volunteer hours or charitable miles here) = Actual cash donated to the charitable committee or to a qualified individual/organization.
Reporting Form
For Use by Committee/Event Chairs to Report on an Event
To Be Provided to the Lodge Secretary once the Final Event Report is given at a Lodge Meeting

Date of this Report: ________________________________

Event/Committee Chair Name: ________________________________

Person Filing Report (if different than Chair): ________________________________

Date(s) Event was Held: ________________________________

Charitable Committee/Program Type: ________________________________

Event/Program Name: ________________________________

Participant Head Count: ________________________________

Number of Elks: ________________________________

Number of Non-Elks: ________________________________

Number of Elks Hours: ________________________________

Number of Helper Hours: ________________________________

Number of Elks Miles: ________________________________

Number of Helper Miles: ________________________________

Amount of Non-Cash Contributions: ________________________________

Amount of Cash Contributions: ________________________________

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