

Section
13 Files and Reports

Permanent and Working Files

Club Activity Report

*“Remember —
No job is complete
until the paperwork’s done.”*

PERMANENT AND WORKING FILES

As with any organization, Altrusa must have a set of permanent and working files to refer to when needed. At the conclusion of the president's term of office, the files, in good order, should be promptly turned over to the incoming president. Periodically, the club's board of directors should authorize the purging and destruction of outdated records that are of no historical value.

Permanent files should contain the following items

- Copies of all minutes of club meetings
- Copies of all minutes of Board of Directors meetings
- Copies of all District Conference reports
- Copies of reports of International Conventions and International Executive Committee and Board of Directors' meetings
- Officially approved copy of the Club Bylaws
- A complete set of club yearbooks
- A complete set of club newsletters
- A complete set of *District Service Bulletins*
- The club charter
- An approved Recommendation for Membership form for each member in the club
- Annual membership dues reports for at least the preceding five years, including membership information forms
- The club chronicle, scrapbook, awards received, correspondence relating to special club projects
- Copies of Form 990, if applicable (United States clubs only)

Working files should contain these items

- The most recent dues report
- Club reports for the past two years
- File folders for each club Officer and Committee Chair
- Reports/mailings received from District Officers and Committee Chairs
- Current issues of International's official publications
- Current *District Service Bulletins*
- Latest procedures and reports on the Altrusa International Foundation, Inc.
- Information about District Conference and fall workshop for current year
- International Convention materials
- Materials from International Office: current supplies catalog and Doc Morgan, Inc. catalog
- President's personal Altrusa files
- Miscellaneous

CLUB ACTIVITY REPORT

As part of Altrusa International, Inc., it is necessary for all clubs to provide Altrusa International with information concerning their progress towards the completion of the goals, objectives, and strategies outlined in the International Long Range/Strategic Plan. This is done through the completion of the Club Activity Report. As president, you are responsible for the completion of this report.

Where is the report?

The International Office will send you a copy of the latest version of the Club Activity Report included in the Awards Packet in the January club president's mailing. (*Altrusa Accent*)

Who completes the report?

As the outgoing president, you are responsible for the report at the end of your term. You may choose to do this by yourself, with a group of Altrusans, or delegate it to another officer.

When must the report be completed?

It must be completed and sent to the designated person in your District by May 31.

Should I keep a copy of the report?

Yes, this is a valuable tool and may come in handy during the next year. In some Districts, clubs may be asked to provide the District visitor with a copy either prior to or during the visit.

How important is the report?

It is very important! Altrusa needs to measure its successes and determine its failures. Members at the club level are the only ones who really know their successes and failures. We must monitor these in order to make improvements in our programs.

The report helps Altrusa International determine the need for changes in its programs. In this way it can provide better service to the local clubs. The report is not meant as a means of checking up on clubs. By the time it reaches the International Office it is a compilation of information from all the clubs in each District.

Please take the time to complete the Club Activity Report.

Please note: The Club Activity Report can be also be found on the Altrusa International website www.altrusa.com