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**2022 Post Annual Report Template**

**Use this template to gather the information.**

**Submit your Annual Report online by March 31, 2023**

<https://www.surveymonkey.com/r/2022PostAnnualReport>

***Fields marked with an \* are required.***

\* 1. Post Name *Select from drop down menu*



2. Post Tax ID/EIN

* 3. Oﬀicial Post Mailing Address

Address 1

Address 2

City/State/Zip

\* 4. Report submitted by: *Submitter certiﬁes they have conferred with other Post leaders and members to complete this Annual Report.*

Full Name

Email

Phone

Your Post Position

Post Treasurer's Name

\* 5. Date of last Bylaws update *(bylaws should be reviewed and updated every 5 years)*

Date

MM/DD/YYYY

## \* 6. When was your Post Oﬀicer roster last updated with the National Oﬀice?



\*7. Did your Post implement anything from the 2022 Post Leaders Workshop?



8. Does you Post have a succession plan for oﬀicers, directors, committee chairs etc.?

Yes No

I don't know

\* 9. How often is your Post website updated?

weekly (or more frequently) monthly

only when we have a meeting or event when someone thinks about it

never

\* 10. Did your Post submit information to SAME National to showcase your local activities/events (e.g., Post Notes for TME)?

Yes No

I'm not sure

11. Did your Post nominate or endorse a member for a national award, Academy of Fellows or Leadership Development Program?

Yes, Awards

Yes, Academy of Fellows

Yes, Leadership Development Program

None of the above

\* 12. How do you welcome new members (*check all that apply*)

Email Phone call

Mailed letter

Recognize in newsletter

Recognize at meetings/events

Recognize on website or social media Nothing currently

\* 13. Does your Post support any ACTIVE Student Chapters?

Yes / No

1. Our Post supports the following Student Chapter(s):



1. Did the Post/Student Chapter submit a [Student Chapter Status Report](https://www.same.org/Online-Forms/Student-Chapter-Annual-Status-Report) in 2022?

Yes / No

\*16. Does your Post support an Active Field Chapter?

Yes / No

17. Our Post supports the following Field Chapter(s):

* 18. How many in person Post Meetings and/or Events were held in 2022?

0-3

4-7

8-11

12-15

16+

\* 19. How many virtual Post Meetings and/or Events were held in 2022?

0-3

4-7

8-11

12-15

16+

\* 20. Did your Post host any of the following special events? *(in person, virtual, or hybrid)*

Centennial Celebration Social Events

Fundraisers (e.g.: golf tournaments) Awards Banquet

Other (please specify)

* 21. Did your Post hold any joint meetings or events with another organization(s) such as DBIA, CMAA, College/University? (not another Post)

Yes No

If yes, which Organization(s)?

* 22. Did you host any joint events with another Post?

Yes No

If yes, which Post(s)?

\* 23. Has your Post utilized any SAME National resources or entities to support your activities? (*check all that apply)*

Communities of Interest Academy of Fellows GoToMeeting account Post Resource Center Post Leader Webinars

Integrated SAME web calendar Strategic Partners

National Board of Direction (RVPs, COI Chairs, etc.)

National Staﬀ

# Please enter ﬁnancial information in whole numbers. No decimals, commas, or $ are necessary.

\* 24. College Scholarships

How many college scholarships did your Post provide?

What is the total dollar amount of all scholarships provided?

How do you track, follow up, or mentor scholarship recipients?

* 25. Do you have a separate fund/account for scholarships?

Yes

No

* 26. Do you provide scholarships for other than 4 year college students?

Yes No

27. Has your Post completed the 990 IRS ﬁling and submitted receipt of ﬁling?

Yes

No

Completed date/Will be completed date (mm/dd/yy):

* 28. Please indicate the date of the Post's last ﬁnancial audit *(required annually):*

Date

## 

MM/DD/YYYY

\* 29. How was your audit conducted?

Internally

Externally

# Please enter ﬁnancial information in whole numbers. No decimals, commas, or $ are necessary.

* 30. Program Revenue/Income *(i.e. golf tournaments, events, meetings, etc.)*
* 31. Total Dues received from SAME National Oﬀice

32. Other Income *(interest, dividends, donations)*

* 33. Total Revenue for 2022 *(Should equal total of lines 30+31+32)*
* 34. Program Expenses *(meetings, scholarships, stipends, etc.)*
* 35. Administrative Expenses *(bank fees, email, registration site, etc.)*

36. Other Expenses

* + 37. Total Expenses *(Should equal total of lines 34+35+36)*
  + 38. Net Activity *(Revenue less Expenses. Line 33 minus line 37)*
  + 39. Checking Account Balance as of December 2022

*Verify your bank account information is current with the national oﬀice to ensure dues disbursements. Contact:* [*accountspayable@same.org*](mailto:accountspayable@same.org)

1. Savings Account Balance as of December 2022
2. Additional Banking/Investment or Reserve Accounts - *Please specify any additional accounts and 2022 year end balance (e.g.: CD $10000, Money Market $8500, etc.)*

Account 1

Account 2

Account 3

Account 4

Account 5

\* 42. I certify on behalf of the Post that we have only conducted activities and events that are consistent with SAME's stated tax exempt purpose. I further certify that the 990 tax return and audit, if not already completed for 2022, will be completed. I understand failure to

comply with these requirements puts the group tax exemption status at risk and may result in the deactivation of the Post.

Yes

1. What is the Post's greatest challenge?
2. How can the National Oﬀice better support the Post?
3. What other Post information would you like to provide that we didn't ask about?

*Thank you for your submission! If you would like a pdf copy of your Post's report, please email* [*posts@same.org*](mailto:posts@same.org%20)