

The 3 easy steps for you to follow when reviewing Annual Reports

Step 1: Read the Reports & make notes as appropriate!

Read through each report. As you review, look at each chapter's overall program. Make notes in MIMI (the new CHIP!) so you don't have to re-review the reports when you provide feedback to your primary chapters. Also, be sure follow up on any items you make notes on.

To help you evaluate the programs, here are some things to look for:

Did the chapter meet during the day? Remember all local chapter activities should be held during the daylight hours with the exemption of MNO, Couple's Night Out or Family Night Out.

How is the chapter doing overall? Are they an active chapter? Do they offer a wide range of activities? Not all chapters do all of the same things, but they should have enough variety for an average mother to enjoy being a member.

Note: There is room for variety from chapter to chapter! Not all groups have a lot of outings or activity groups. Some chapters will do LOTS of service projects; some may do only one. Some chapters will have casual meetings with discussions; others will have very structured meetings with speakers. Either end of the range is fine if it suits the needs of the members. However, in general, the more variety of activities and meeting offerings, the stronger the chapter is.

Financial Section:

Does it make sense? Does it add up? You don't have to check the math down to the penny, but the overall feel should be right. Does the chapter only have 1 years' worth of expenses in their account? Are they hoarding money? If it isn't clear, ask them if there is a plan for accumulated funds in their treasury.

Member Dues: Does number of members match dues collected?

Were their party expenses modest? Do their expenses for parties, outings or any other activities that directly benefit only their members fall below the 15% of DUES income that International guidelines permit? (More on this important issue next!)

NOTE: If you have a chapter that is over the 15% party expense limit, **TALK TO THEM BEFORE DISCUSSING PROBATION OR EVEN MENTIONING THE WORD!!!!!!** ASK for their input on what caused them to be over the allowed amount. Maybe they recorded an expense in the wrong column, or maybe they did not fully understand the policy and it needs to be explained again. Go over the party expenses to verify that they are truly party/member's only expenses.

If a chapter does go on probation for party expense (or any other reason), that letter will come from the RC or CC, but they need to know ahead of time that they will be going on probation. Before probation letters are sent out, the RC will send out a list of all chapters who will be receiving a probation letter. Primary Coordinators will want to ensure that any of their chapters on the list are notified in advance of the probation. The letter from the RC or CC should not be the first time a chapter hears about the probation; it should simply be a letter confirming the probation and outlining the terms of it.

Not all chapters who go over 15% will be placed on probation. We take into consideration what the percentage is for this year, as well as last year, along with any other extenuating circumstances.

Annual Report/Tax Exempt Questions:

Did they declare that none of their members WERE paid? This is required information for their nonprofit status. No local MOMS Club chapter members or officers can be paid for their work with the chapter. This does NOT include any members who suffered hardships last year and received charity from the chapter.

Was there a time for members to vote on all their chapter's activities and expenditures? All voting should take place at their monthly business meeting.

Step 2: Chapter Feedback

Primaries should be contacting chapters with questions they have regarding items on the financial report. If you have questions about an item that you are unsure about, contact your Supervising Coordinator, RC or CC.

If there were any problems that showed up on the reports (like a horrible children's room or pro-rating dues), point out the problem and offer your assistance and fact sheets, if appropriate. (Important! If the chapter has any serious problems, be sure to discuss them with your supervising Coordinator before writing to the chapter).

Step 3: Nominate Your Outstanding Chapters for Recognition!

The International MOMS Club gives recognition certificates to our outstanding chapters. These certificates help our successful chapters know that we know when they're doing something great and give other chapters an incentive to improve.

A self-nominating option was available for each chapter within the Annual/Financial Reports. We invite all chapters to self-nominate themselves for anything they feel they have done particularly well. Some chapters take us up on the invitation and send us LOTS of nominations. Some other chapters never self-nominate themselves but should because they are so terrific.

In addition to the self-nominations, **we ask all Coordinators to nominate any chapters they feel are deserving of recognition.** So, as you look through the Annual Reports, keep in mind which chapters have been truly spectacular, so you can nominate them for recognition, AND keep in mind what a chapter may have self-nominated themselves for, so you can decide if they deserve the recognition or not. If they self-nominated themselves for an award you do not think they deserve, do NOT approve giving them that award!

All chapters that helped form sister groups (by registering the new chapter or by actively supporting the new chapter) will receive Spirit Awards from International. Also, all chapters that have contributed to the Mother-to-Mother Fund in the last year receive special recognition from International. The names of the chapters receiving those awards from International are pulled from the monthly New Chapter and M2M Donation Reports the CC receives each month, and the RC will forward a complete list of these awards as soon as it is available so you can confirm it against the report.

When you're looking through the Annual Reports, check the section that asks about sistering, just in case we might have missed their participation. If a new group founder didn't mention that another chapter helped her, we may not be aware of it.

For other ideas of recognition, when you look through the reports, remember that we are willing to recognize ANY chapter that has done something particularly well. Each chapter should have something to be proud of, so look for their strengths. There should be something outstanding in every group, but if a chapter truly has not done anything outstanding, don't nominate them for an award.

There is one category of recognition that is very hard for a chapter to receive -- that is the Outstanding Overall Chapter and Outstanding New Chapter Awards. These are our highest awards!

Chapters that are older than one year are eligible for "Outstanding Overall Chapter," while chapters that are younger than one year are eligible for "Outstanding New Chapter." The criteria are the same for both, but the older chapters are held to a higher standard than the younger ones.

Here are the criteria for Outstanding Overall Chapter and Outstanding New Chapter Awards. Chapters must do an excellent job in ALL categories:

- **Did they follow the Bylaws?** Outstanding chapters follow the Bylaws and all MOMS Cub guidelines without question.
- **Did they run a well-rounded program for their members?** Speakers, discussions, a well-run children's room, a variety of outings, playgroups, other activity groups, service projects, family parties (costing the chapter less than 15% of the dues received) -- these are all taken into consideration. A chapter that has lots of activities for its mothers-of-infants, but nothing for the mothers of older children (or vice versa) would not be offering a well-rounded program.
- **Did they communicate with their Coordinator?** Did they send in their newsletter or email update EVERY MONTH? Were they cooperative? A chapter MUST communicate often and positively with their Coordinator to receive this award.
- **Did they support the International MOMS Club?** Yep, they have to support us, just as we support them! Indications of supporting International include:
 - ✓ **Buying Pins or MOMS Club merchandise** (that's how we keep the chapter registration fees so low!);
 - ✓ **Forming sister chapters;**
 - ✓ **Donating to the Mother-to-Mother Fund and/or Sustaining Chapter;**
 - ✓ **Participated in Conference events, by attending the Board Workshop AND the luncheon**

Outstanding chapters should support International by doing all four of the above. New chapters are given some slack on forming sister groups and possibly on donating to the M2M Fund since they're still getting off the ground.

That's it... 3 easy steps that sound a lot harder than they are!