

John R. Rupp
Government Relations Chairman
Utah Elks Association
209 Country Club Drive
Stansbury Park, Utah 84074



home: 435-843-5531
cell: 435-830-2343
cjrupp@wirelessbeehive.com

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To: All UEA Exalted Rulers/Lodge Secretaries/Lodge Committeemen
All UEA State Officers/District Committeemen/ State Committeemen

Subject: The Reporting of Charity Information for the Utah Elks Association

My Fellow Elks;

The accurate and complete reporting of the Utah Elks Association is extremely important. It is our proof that we are a "Charitable Organization" and is critical to maintaining our IRS status as a charitable organization.

To assist in clarifying what must be reported, who must report it and to whom it should be reported I offer the following guidance.

- 1) The information for all Lodge level events should be reported by the Lodge Officer or Lodge Committeeman responsible for the event. The information to be reported should include total hours, total miles, monies donated, etc. for both Elks and non-Elk volunteers for the planning, preparation, conduct and followup for the event. At the Lodge level this should be reported to the Lodge Secretary for inclusion in the Lodge's annual report.
- 2) The information for all District and State level events should be reported by the District or State Committeeman responsible for the event. The information to be reported should include total hours, total miles, monies donated, etc., for both Elks and non-Elk volunteers for the planning, preparation, conduct and followup for the event. At the District/State level this should be reported to the UEA State Secretary for inclusion in the Utah Elks Association Annual Charity Report. This information should be reported quarterly with the final report due to the State Secretary by April 15th each year.
- 3) The following list is offered as a partial listing of information that should be reported by State Officers and District/State Committeemen:
 - Item 1. Total mileage to and from functions, meetings, lodge visits and all other Elk involved visitations.
 - Item 2. Total hours spent traveling to meetings, functions, lodge visits, etc.
 - Item 3. Total hours spent planning for, working on and attending above mentioned events.
 - Item 4. All Elk related long distance phone charges and postage.
 - Item 5. Major project income and budget amounts.

Item 6. All charitable donations at the District or State level.

Item 7. All out of pocket monies or UEA supplied budget funds expended on functions.

Item 8. Monies raised from golf tournaments and other fund raisers.

4) To assist in the effort of gathering this information I have devised the following attached forms:

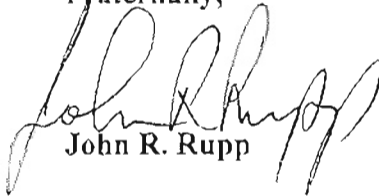
UEA Form GR-1: This is a simple sign in form for meetings such as committee meetings at state meetings. We do not need to gather the miles/hours, etc. for each committee meeting as they are repetitive. We need to gather this information for state meetings once when the attendees register.

UEA Form GR-2: This is a sign form to gather the required information one time at each meeting/event. This information should also be added as part of the pre-registration information for State meetings and collected at the time of registration for those that do not pre-register. This information should be collected by the "Host Lodge", compiled and reported to the State Secretary as part of the after actions report for the meeting.

UEA Form GR-3: This is a standardized report form to use in reporting the required information to the Lodge/State Secretary.

Hopefully this will help clarify what information must be reported. If you have any further questions concerning this subject, please feel free to contact me.

Fraternally,



John R. Rupp