

To: Subordinate Chapter Secretaries

November 2011

RE: The 2011 ANNUAL REPORT FORM - DO NOT READ THESE INSTRUCTIONS IN CHAPTER

Please keep these instructions with the annual report form for reference. Other items you will need for reference are the Secretary's Guidelines and Quick Reference Book and the Chapter's copy of the 2010 filed Annual Report form.

Enclosed are two copies of the Annual Report form for the year ending December 31, 2011. One is a working copy and the other is to be completed as the original, mailed to the Grand Secretary and post marked **ON OR BEFORE JANUARY 16, 2012**. If the report is not postmarked on or before January 16, 2012, please include a chapter check for the \$25.00 late fee when mailing the annual report to cover the fine for a late filing. If the Report is not postmarked on or before January 16, 2012, it will be considered LATE and the late fee MUST BE paid. For a small cost you can obtain a certificate of mailing from the Post Office. If you have a certificate of mailing dated on or before January 16, 2012 confirming the report was mailed on or before that date, the late fee will be waived. The proof of mailing is your responsibility.

The report should be typewritten. If it is not possible to type the report, please print neatly and legibly using a black pen. Return all pages of your original report - no carbon copies - to the Grand Secretary.

This report is being sent electronically in Microsoft Word. The report is also available in Word Perfect. If you need in the Word Perfect format, please contact me directly and it will be forwarded to you. No other format will be accepted. You must make sure the report prints on the pages in the format given. If you do not have one of these soft-wear programs, please complete the hard copy report using a typewriter, and mail it back to the Grand Secretary via United States Post Office first class mail.

The tables are numbered as Boxes to assist with the preparation of the form.

Box #1 covers all of Pages 1, 2, 3, 4 and 5, **List all who are members of the chapter as of January 1, 2012**. List Sisters first, alphabetically, noting (Miss, Mrs. or Ms.) and whether they are a Past Matron (PM) of a Florida chapter. Brothers are listed alphabetically following the Sisters, and it should be noted whether they are a Past Patron (PP) of a Florida Chapter. If the member is a Dual Member, type "Dual" after the name. If the member is a Plural Member, type "Plural" after the name. Do not skip lines - the total number of entries must equal the ► **Present number of members per List of Members**, Box #1, pages 1, 2, 3, 4 and 5 on page 15 of the report.

Example: Smith, Mrs. Jane, PM Or Smith, Mrs. Jane, Dual or Plural if appropriate

Box #2, page 6, list all Fifty-year members, (including Dual, Plural and Perpetual) who have been members in good standing for at least 25 of those 50 years in a Florida subordinate chapter or chapters. The number of entries in Box #2 must be carried forward to line #2, page 14 under 50 Year members - 25 years in Florida). If any 50 year member listed in Box 2, pg 6, is also a Perpetual member listed in Box 23, pg 12, carry that number forward to line #3, pg 14 as a negative number. The reason for computing the deduction is to determine the number of members on which the chapter pays per capita tax.

Box #3, page 6, list all members heretofore omitted on previous report(s). List the member's name, date initiated or affiliated and the year of the report from which the member was omitted. The number of entries in Box #3 must be carried forward to the Summary on page 10-A under Number omitted through error on previous report(s) AND listed on page 14 where applicable.

Box #4, page 7, list all Dual Members giving their name, Primary Chapter name, number and location. Include all prior Dual Members and those becoming Dual Members this year (from Box #6, page 8). All the

names listed in Box #4 on page 7 are to be included in the list of members in Box #1, pages 1, 2, 3, 4 and 5. This is not a duplication. Box #4 is for information regarding the Dual Members of the chapter.

Box #4-A, page 7, list all Plural Members giving their name, Primary Chapter name, number and location. Include all prior Plural Members and those becoming Plural Members this year (from Box 8-A, page 8. All the names listed in Box 4-A on page 7 are also to be included in the list of members in Box #1, pages 1, 2, 3, 4 and 5. This is not a duplication. Box 4-A is for information regarding the Plural Members of the chapter.

Box #5, page 8, list all members who were initiated during the year 2011 and the date they were initiated. The number of entries in this box must be carried forward to the Summary on page 10-A.

Box #6, page 8, list all who became Dual Members during the year 2011 and the date they became a dual member of the chapter. The number of entries in this Box #6 must be carried forward to the Summary on page 10-A. Be sure these new Dual Members are listed also in Box #4 on page 7.

Note: All Dual Members are listed in Box #4 on page 7 along with their primary chapter name, number and location. When a dual member leaves the chapter, whether demitting, deceased, suspended, expelled or terminating Dual Membership and becoming a regular affiliated member, (change of membership status) they are listed in Box #14, page 10.

Box #7, Page 8, list the names of members reinstated or whose membership has been restored during the year 2011 and the date they were reinstated or membership was restored. The number of entries in this Box #7 must be carried forward to the Summary on page 10-A. Finally, they are counted for deduction on page 14 in the Estimate of Per Capita Tax Due.

Box #8, page 8, list the names of members affiliating during the year 2011 and the date they affiliated as a member of the chapter. List these names in box 17 also. (The first Florida chapter where the member held membership pays the per capita tax.) (Do not include Dual or Plural Members who terminated Dual/Plural Membership and regularly affiliated with the Chapter) The number of entries in Box #8 must also be carried forward to the Summary on page 10-A.

Box #8-A, page 8, list all who became Plural Members during the year 2011 and the date they became a Plural Member of the chapter. The number of entries in this Box 8-A must be carried forward to the Summary on page 10-A. Be sure these new Plural Members are listed also in Box #4-A on page 7.

Note: All Plural Members are listed in Box #4-A on page 7 along with their primary Florida chapter name, number and location. When a Plural Member leaves the chapter, whether demitting, deceased, suspended, expelled or terminating Plural Membership and becoming a regular member, (change of membership status) they are listed in Box #14-A, page 10.

Box 8-B New: If the Dual or Plural member joins the chapter as a regular affiliated member, list them as affiliating in Box 8-B. Plural Members are NOT counted for deduction on page 15 in the Estimate of Per Capita Tax Due because they must pay dues in both chapters and both chapters must remit the per capita tax on Plural Members.

Box #9, page 9, list the name and date of all members who died during the year 2011. Do **not** include deceased Dual or Plural Members in this box but list their names and date of death in the Dual Members terminated during the year in Box #14, or Plural members terminated in Box 14-A, page 10. The number of entries in Box #9, page 9 must be carried forward to page 15.

Box #10, page 9, list all members demitting during the year 2011 and the date of demit. Do not include Dual Members demitting in this box but list them in Box #14. Carry this number forward to page 15. Also do not include Plural Members demitting in this box but list them in Box #14-A and carry the number forward to page 15.

Box #11, page 9, list all members who were suspended during the year 2011 and the date of suspension. The number of entries in Box #11 must be carried forward to page 15. Do not list suspended Dual and/or Plural Members in this Box but list suspended Dual and/or Plural Members in Box #14 (Dual) or Box #14-A (Plural). Do not list suspended emeritus members here but list them in Box 11-A and carry forward to page 15.

Box 11-A The current Green Book says: Section 79, Suspension, page 128, top of page, "Emeritus members whose whereabouts are unknown and cannot be determined for two years shall be automatically removed from the roll of membership." Box 11-A, page 9 was added to the Report in 2009 to list Suspended Emeritus Members for the current year. The number is carried forward to Page 15.

Box #12, page 9, list all members who were rejected during the year 2011 and the date of rejection. This is an information box only.

Box #13, page 9, list all members who were expelled during the year 2011 and the date of the expulsion. Carry this number forward to page 15. Dual and Plural Members suspended should be listed in Box #14 or Box #14-A. The number in Box 13 is carried forward to Page 15.

Box #14, page 10, list all Dual Members terminated during the year either by death, demit, change of membership status, suspension, or expulsion and the date of same. Carry this number forward to page 15.

Box #14-A, page 10, list all Plural Members terminated during the year either by death, demit, change of membership status, suspension, or expulsion and the date of same. Carry this number forward to page 15.

Box #15, page 10, list all name changes during the year. This is an informational box only.

Box #16, page 10, list all emeritus members exempt (emeritus members) by special action of the chapter and the date exempted. In first block insert original date member became an Emeritus Member and in the second block, insert the last date the Chapter reviewed the Emeritus Member's status. Carry this number forward to middle of page 14.

Box #17, page 10-A, List affiliated members having previous membership during the year within Florida and list the Florida Chapter name and number in which they had previous membership during the year and the date of the demit from the previous chapter. (The Florida chapter where the member first had membership during the year pays the per capita tax)

There is no credit for Plural Members. Plural Members pay dues in each Florida chapter in which they hold membership. Each chapter pays per capita tax and any assessments on the member.

Page 10-A, **SUMMARY** at bottom of page 10-A

Explanation

Number of members at last report	This number is carried forward from Page 15, ► Present number of members, 2010 Annual Report,
Number omitted on previous report(s)	Number from Box #3 on page 6
Number Initiated during the year	Number from Box #5 on page 8
Number of Dual Members during the year	Number from Box #6 on page 8

Number Reinstated or whose membership Restored during the year	Number from Box #7 on page 8
Number Affiliated during the year	Number from Box #8 on page 8
Number of Plural Members during the year	Number from Box #8-A on page 8
Whole number during the year	* Add all of the above to together and carry this number over to one place on page 14 and one place on page 15 where the * appears.

Pages 11, 12 and 13, **Perpetual Membership:**

Box #18, page 11, List all **New Perpetual Members Certified** by the Grand Secretary during the year 2011. State name of member, type of perpetual membership, date perpetual membership certified by the Grand Secretary and the per capita amount in effect on that date. Carry number over to line 2 on page 13. ¹ **NOTE:** there is no Special Assessment in effect if the member became a Perpetual Member in 2011.

Box #19, page 11, List all **Regular Perpetual Members Affiliating from Other Florida Chapters** during the year 2011. Carry over this number to line 3 on page 13.

Box #20, page 11, List all **Regular Perpetual Members who demitted and affiliated with another Florida Chapter this year**, giving name and new Florida Chapter name and number. Carry this number over to Line 4 on page 13.

Box #21, page 11, List all **Regular Perpetual Members who died during the year**. This is just an informational box.

Box #22, page 11, List any changes in **Regular Perpetual member's status not covered above**. Carry this number over to line 5 on page 13. Deduct or add as the case may be.

Box #23, page 12, List **All Living Regular Perpetual Members at the end of the year** 2011. Carry this number to line 7 on page 13. Also, carry this number over to the section **Estimate of Per Capita Due To Grand Chapter** on page 13. ¹

Box #24, page 12, List **All Deceased Regular Perpetual Members at end of year**. Carry this number over to line 8 on page 13. ¹

Box #25, page 12, List **All Memorial Perpetual Members at End of Year**. Carry this number over to line 9 on page 13.

Box #26, page 13, List **All Honorary Perpetual Members at End of Year**. Include per capita in effect on the date they became a perpetual member. Include all deceased Honorary Perpetual Members with their date of death. Carry this number over to line 10 on page 13. ¹

¹ In Box 18, 23, 24, 26 and 27, fill in the amount of per capita tax, any special assessment and chapter dues in effect as of the date the member became a perpetual member. **note: in box 18, there is no special assessment in effect for 2011.**

Box #27, page 13, List all **Demitted Perpetual Members Who Have Not Affiliated With a Florida Chapter**. Carry over this number to line 11 on page 13. ¹.

PERPETUAL MEMBERSHIP SUMMARY - compute per instructions on form and above.

Note: In the Perpetual Membership Summary, line 6 must equal line 12.

Page 14 **COMPUTATION OF SPECIAL ASSESSMENT**

There is no computation of the Special Assessment for the calendar year ending December 31, 2011. If, however, any member has made a voluntary contribution in 2011 for the Special Assessment, it should be forwarded by separate Chapter check, marked for "Special Assessment," to the Grand Secretary with this Annual Report.

ESTIMATE OF PER CAPITA TAX DUE TO GRAND CHAPTER - Self explanatory.

Per Capita Tax for the year 2011 is based on \$6.00 per member using the computation in this category. The resulting dollar amount is due from the Chapter to Grand Chapter for Per Capita Tax. This should be by a separate check payable to The Grand Chapter of Florida, Order of the Eastern Star, Inc.; on the "for" line indicate 2011 Per Capita Tax.

ESTIMATE AMOUNT DUE FOR INTERNATIONAL HEADQUARTERS FUND - Self explanatory.

Obtain the information from Page 8, Boxes 5, 6, 8 and 8-A and total. Multiply the total number of new members, whether by Initiation, Affiliation, Dual or Plural, by \$5.00 each and indicate the total on the proper line. The resulting dollar amount is due from the Chapter to Grand Chapter and will be paid by Grand Chapter to General Grand Chapter for the International Headquarters Fund. Pay the amount by separate check payable to The Grand Chapter of Florida, O.E.S., Inc. On the "for" line indicate "2011 International Headquarters Fund".

If a member is re-affiliating, being reinstated or restored to membership in her/his original chapter, or if the member is a Dual or Plural member becoming a regularly affiliated member, and paid the International O.E.S. Headquarters fee when first becoming a member of that chapter, the Chapter is not required to pay the fee a second time.

Page 15 - NEW- ESTIMATE OF AMOUNT DUE TO GRAND CHAPTER FOR THE GENERAL FUND, "A DIME-A-WEEK" VOLUNTARY CONTRIBUTION

Section 30 DUES, page 92 was amended in April 2010 as follows: The Secretary shall send statements for dues to each member of the chapter on or before November 15 of each year, for the subsequent year's dues, such statements to include a request for the Grand Chapter General Fund "A Dime A Week" or \$5.20, as a voluntary contribution. All "A Dime A Week" donations shall be forwarded to the Grand Secretary with the Annual Report. (2011)

This is an annual computation for contributions received during the calendar year January 1 to December 31 of 2011. Contributions received after December 31, 2011, will be submitted with the 2012 Annual Report. This will require that Secretaries keep an accurate running total of these contributions during the calendar year so as to remit the proper amount with the Annual Report.

This computation section is self explanatory. **Remit with the Annual Report the amount of all voluntary contributions received during 2011 for the General Fund, "A Dime A Week." This should be by a separate Chapter check, payable to The Grand Chapter of Florida, Order of the Eastern Star, Inc. Designate on memo line For: Dime-A-Week.**

ESTIMATE OF MEMBERS AT THE CLOSE OF THE YEAR AS A BASIS FOR NEXT REPORT - Self explanatory - This computes the number of members the Chapter had as of January 1, 2011. The "Total" line under this section should equal the number of names listed in Box #1, pages 1, 2, 3, 4 and 5.

CERTIFICATE SIGNED BY THE SECRETARY AND WORTHY MATRON AND UNDER THE CHAPTER SEAL. Should be signed and dated by the Secretary and the chapter seal affixed. Should be examined, approved and signed by the Worthy Matron.

Be sure to read the NOTE on Pg 14 of the Report Form, under **ESTIMATE OF PER CAPITA TAX DUE, DEDUCT.** It is possible that in entering the number of members to be deducted, a member could possibly be deducted twice, i.e. Member could be a 50 year member with 25 years in Florida and could also be a Perpetual Member. In that instance the Chapter would only be entitled to one Per Capita tax deduction. If you encounter this situation, please refer to the line numbered e. on pg 14 and follow those instructions and re-read the instructions for Box 2, pg 6 above.

ATTENTION: The Annual Report, due on January 16, 2012. Any Chapter failing to file an annual report and pay the Grand Chapter per capita tax and other assessments, on or before January 15, of the succeeding year shall not be entitled to representation in the Grand Chapter or compensation for attendance, unless by special act of the Grand Chapter. See Green Book, R & R. Sec. 6, paragraph 5, page 71. This law will be strictly enforced.

If you have any questions about the Annual Report do not hesitate to contact me.

Fraternally,

Linda J. Dudley

Linda J. Dudley, Grand Secretary

PLEASE NOTE: PER CAPITA TAX FOR NEXT YEAR'S REPORT, FOR THE PERIOD JANUARY 1, 2012 TO DECEMBER 31, 2012, WILL BE \$6.50.