



Ladies Ancient Order of Hibernians, Inc.
Office of the National Secretary
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There have been questions about Chaplains being counted, or not counted, as members. If not listing him/her as a member, then they cannot be deducted off as a Religious Member. You must be consistent with your report.

Instructions for Completing the 2023 Membership Reports

Do not Change: file name, font, format (keep xls. format only). Do not add, delete, or change columns. Do not type in all CAPS. These forms must be merged with other reports. Some EINs were incorrect last year but were corrected. **Never change your EIN number.** Please keep in mind that the National Secretary has almost 240 reports to review and to combine into other reports. Any submitted 2023 reports not following all the instructions, incomplete or incorrect, will be rejected. **All reports, including the Tax Bill, will be required to be verified by the respective Secretary and Treasurer, no names should be electronically signed without the officer having verified the report.**

- **The Degree Team and Junior membership reports will be sent by the National Vice President directly to the Degree team directors and Junior coordinators, in the entity which they are established. These reports will be completed and returned to the National Vice President and the State Vice President. The State President will send a copy to the National Secretary.**

When the reports are emailed to the states from both National Treasurer and National Secretary, there will be a TAX BILL included from the National Treasurer to assist in the calculation of the Per Capita Tax and Assessment. Before a State forwards the membership reports, they must be reviewed, and corrected, as needed, or all the reports submitted will be returned to the State Secretary as if not received. If reports are not correct, they will be considered late, and fines assessed. Please verify your membership numbers with your Treasurer prior to sending the reports.

Overview of Process for filing End-of-the-Year Membership Reports **All reports are due on the day requested as the close of business, 5 PM ET**

DIVISIONS

Each **Division** shall receive, through their State and County Boards (If applicable), a copy of their Membership report. **If this is your first time completing a membership report, please reach out to your predecessor or President**

1. Division Financial Secretaries are required to complete the Division Membership report and forward it to the State Secretary, if no County structure, by January 31, 2024. If you have a County structure then your report will be due to the County Secretary by January 31, 2024.
2. Each Division must send their **\$5.00 per taxable member Per Capita** and **\$.50 assessment per taxable members (.50 Appeals for Aid)** to their County Board or State Board by January 31, 2024. This will ensure the correct payment of the National per capita and assessments to the National Board.

3. Per the 2022 Constitution:

Article XV Section 8.

a. Religious members and Consecrated Virgins of the Order are exempt from all National Board, State Board, County Board, and Division per capita tax and all assessments.

b. All religious members should be included in our division total member count.

4. **Single Division States** must file their membership reports with the National Secretary **by January 31, 2024**, and the Treasurer is to mail the \$5.00 per taxable member taxes and \$.50 per taxable member assessment, to the National Treasurer, with a copy of the Tax Bill, by the SAME DATE. **Mail check payable to the LAOH Inc to National Treasurer Cathy Turck, 108 West Creek Lane, Altamont, NY 12009.**
5. The **Division's Membership Report has four tabs** that require completion. If there is a yellow background, that indicates information is needed.
6. The **first tab** is the "Cover Sheet" and is a summary sheet and certification. The boxes are self-explanatory. **All boxes must be completed.** Please make all necessary corrections. Verifying electronic signatures are those of the Officers during 2023.
7. The **second tab** is "Division Officers" and is the standard tab listing the Division's Officers for 2024. If the position is vacant; please type VACANT and do not delete the line. The Report is not acceptable without the correct addresses, email addresses and phone numbers and degree year of all the Officers. All email addresses must be verified before completing and sending the report.
8. The **third tab** is "Division Member Total" and is the place you input your changes to the numbers of members since 2022. PLEASE NOTE THE ADDITION OF LINE NUMBERS IN COLUMN B FOR SECTIONS A, B AND C. **Calculation formulas have been added for your convenience.**
 - a. **SECTION A, 1-2-3** are for inputting increases in your membership (new members, transfers, and reinstatements).
 - b. **SECTION B, 1-2-3-4** are for recording your decreases in membership (dropped, resigned, transferred, deaths).
 - c. **SECTION C LINE 1** is the total membership number reported on your 2022 report and **CANNOT** be changed. If there is a discrepancy, contact your State Secretary.
 - i. **SECTION C LINE 5 is your total membership for the Division.** This number should match the number of Members listed on the Membership list.
 - ii. **SECTION C LINE 9 is your Division's taxable membership.** Each Division must send to the County or State Board the \$5.00 per taxable member for the National Per Capita Tax and each Division must send to the County or State Board the \$.50 assessment per this number of total taxable members.
 - iii. On the bottom of Tab 3, please list again your religious and National Life Members by name. If possible, add year for Life Members.
9. The fourth tab is "All Members 12-31-2023." I have copied the 2022 Membership list to this 2023 worksheet. Please review and make all necessary changes, adding or deleting members as needed, changing email address, phone numbers, address, etc. Please make sure you have entered the year of initiation and if degreed please add the year (not Yes or No.) If you do not know the year that a member was degreed, ask them at which convention they received their degree or what degree team presented their degree, and come up with the year.
10. The remaining tabs are old membership lists for your reference only. **Do not remove, or change, from the report.**
11. Before submitting the Division report, **review and confirm** that all information, including emails, is correctly provided and complete. There should be no blank fields. The report should not be submitted incomplete or incorrect to the next level as fines will be levied per National Constitution Article VIII. (See below.) Email addresses will be used for official communications only. **Keep the exact file name as the report was sent and make sure you saved it in .xls format only.**

FOR STATES WITH COUNTY STRUCTURES PLEASE FOLLOW THE BELOW INSTRUCTIONS:

12. County Secretaries are required to collect the membership reports from the Divisions within her County, review the division reports, complete the County Membership report, and forward all the Divisions' reports, as well as the County Report, to the State Secretary by February 28, 2024. The County Secretary will complete the 2023 report and ensure payment of the National Per-Capita taxes and assessments from the Divisions within the County to the State Board.
13. County Reports include 3 tabs.
 - a. The **first tab** requires the listing of the County Officers. Do not add all Past County Presidents.
 - b. The **second tab** is the Approval page. It requests a listing of the Divisions within the County and the Divisions' number of Members and has the Certification.
 - c. The **third Tab** is the "Data Sheet". It is the listing of the Divisions in the County with their 2023 membership numbers.
14. Before submitting the county report and all division reports in the county, review and confirm that all the information provided is correct and complete. there should be no blank fields, on both the county and division reports. The reports should not be submitted incomplete or incorrect to the next level or they will be rejected, and fines will be levied. Prior to submitting the reports, please confirm that all emails are updated and accurate to avoid having the report rejected for corrections as this will result in fines and suspensions per our National Constitution Article VIII. (See below.) **Keep the exact file name as the report was sent and make sure you saved it in .xls format only.**

ALL STATE SECRETARIES, EXCEPT FOR SINGLE DIVISION STATES, PLEASE FOLLOW THE DIRECTIONS BELOW:

15. State Secretaries are required to collect the membership reports from the Divisions/Counties within the State. Complete the State Membership Report. All totals on the State Membership Report, all Division and County Reports must match before submitting to the National Secretary electronically by March 31, 2024, to avoid fines and possible suspensions per our National Constitution Article VIII. (See below.)
16. The State Report has 3 tabs.
 - a. The **first tab** requires the listing of the State Officers for the 2024 year.
 - b. The **second tab** is the Approval page. It requests total number of Divisions and Members and has the Certification signed by the 2023 report year Officers.
 - c. The **third Tab** is the "Data Sheet". It is the listing of the Divisions in the State with their 2023 membership numbers. Calculations have been added.
17. Before submitting the State Report, County and Division reports, the State Secretary is to review all reports to confirm all information is complete and correctly provided. There should be no blank fields. The reports should not be submitted incomplete or incorrect to the National level or they will be rejected, and fines will be assessed to the State with possible suspensions. The National Secretary emails the reports to be completed in alphabetical order, ensure that the completed reports are returned in the order that they were sent, along with the **exact same file name in .xls format**, as these reports are all merged with other reports. All the reports are to be returned on the same day; reports cannot be reviewed if all are not available. Prior to submitting the reports, please confirm that all emails are updated and accurate to avoid having the report rejected for corrections. if a State report is submitted without all the entities in that State, the State Secretary must notify National the reason for the missing entity, otherwise fines will start to be assessed for that State until all reports are in.

NATIONAL CONSTITUTION ARTICLE VIII

OFFICERS' FILING REQUIREMENTS: NATIONAL ANNUAL MEMBERSHIP REPORT:

Section 5. The National Secretary shall furnish through the State Secretary electronic copies of the annual membership report for each entity recognized within the State. The National Secretary will provide the previous year's December 31st total membership for each entity. The State Secretary is

to furnish each entity within the State with its annual membership report. At the Division level, the report is to be completed by the Financial Secretary. At the County Board level, if any, the report is to be completed by the County Board Secretary.

Section 6. The Division Financial Secretary shall inform the Division Treasurer of the taxable member count and shall request the disbursement of the applicable tax payment.

Section 7. The membership report should include name, address, city, state, zip code, phone number, email address, year member was initiated, and if a Degreed member with the year the Degree was received.

Section 8. The dates for filing the annual membership reports shall be as follows:

- A. Division Financial Secretary to County Board Secretary, if applicable, on or before January 31st.
- B. County Secretary to State Secretary on or before February 28th.
- C. State Secretary to National Secretary on or before March 31st.
- D. Degree Teams are to file their annual report January 31st with their sponsored entities.
- E. Junior Divisions are to file their annual report January 31st with their sponsored entities.

NON-COMPLIANCE WITH FILING DATES DIVISION-DEGREE TEAM-JUNIOR DIVISION

Section 11. The Division, Degree Team, or Junior Division shall be assessed a fine of \$25.00 for the first seven (7) days following the January 31st deadline and an additional \$25.00 fine for an additional seven (7) days. After fourteen (14) days the Division, Degree Team or Junior Division shall be suspended for not complying with mandated deadlines and the Division, Degree Team or Junior Division shall immediately cease all Hibernian business and activities.

COUNTY BOARD

Section 12. The County Board shall be assessed a fine of \$50.00 for the first seven (7) days following the February 28th deadline and an additional \$50.00 fine for an additional seven (7) days. After fourteen (14) days the County Board shall be suspended for not complying with mandated deadlines and the County Board shall immediately cease all Hibernian business and activities.

STATE BOARD

Section 13. The State Board shall be assessed a fine of \$100.00 for the first seven (7) days following the March 31st deadline and an additional \$100.00 fine for an additional seven (7) days. After fourteen (14) days, the State Board shall be suspended for not complying with mandated deadlines and the State Board shall immediately cease all Hibernian business and activities.

REINSTATEMENT

Section 14. A suspended Division, Degree Team, Junior Division, County Board or State Board may be reinstated by the National President upon payment of taxes and late fees due and receipt of annual reports, no earlier than May 16th, or thirty (30) days after receipt of taxes, late fees and reports, with the understanding that once reinstated, the current year's taxes shall be charged for the entire calendar year.

Check List

- ___ Did you keep the file name the same and saved it in the .xls format?
- ___ You did not add any background colors, typed, other than abbreviations, in all CAPS, or change fonts.
- ___ You verified all names, addresses, email addresses, phone numbers, initiation year, etc. and are in alphabetical order.
- ___ All verifying Officers have reviewed the report for completeness and accuracy.
- ___ You have shared the correct total members and taxable members with your Treasurer.
- ___ You did not abbreviate the names of Cities.
- ___ You entered a year for the Degree Received and Year Initiated Column.
- ___ You gave yourself a pat on the back for being an amazing volunteer!