



Preparing for your Branch President Annual Reports

Iryna Sawchyn Doll
Branch President Orientation and Training
Dec. 4, 2021

Simple yet SO Effective

Keep and update **THREE “Master Lists”** of key data points:

1. **Meetings and events**, dates
2. **Major financial transactions**
 - income – when, sources
 - donations – when, for what causes
3. **New Members** and when they started

Example: Master Meeting List

Meetings and Events for Your Branch

DATE	Meeting	Description
12.4.2021	BP Orientation	Meeting for Branch Pres and
12.10.21	branch meeting	Koliada
12.18.21	br meeting	Bazaar

Branch President Orientation Dec. 4, 2021

Example: Master Meeting List

Meetings and Events for Your Branch

DATE	Meeting	Description
12.4.2021	BP Orientation	Meeting for Branch Pres and
12.10.21	branch meeting	Koliada
12.18.21	br meeting	Bazaar

Branch President Orientation Dec. 4, 2021

Example: Master Finance List

DATE	In/ Out	Amount	Description
12.4.2021	donation to HQ	\$350	Babusia fund
12.10.21	income	\$200	Koliada
12.18.21	income	\$150	Bazaar

Example: Master Members List

New Members		
DATE	NAME	FROM
12.4.2021	Orysia Lajda	Orange
jan 10 2022	Marta Sydyr	Irvington

Branch President Orientation Dec. 4, 2021

Advantages

1. YOU WILL FORGET!
2. Easy access to critical data
3. Makes writing zivity/ reports much easier
4. You can transfer critical data to the next President
 - continuity

Summary

Use of simple-to-upkeep, simple-to-retrieve data helps Branch President prepare for reports!!!

Questions?