



**EMPLOYMENT APPEAL BOARD
EMPLOYEE ORGANIZATION ANNUAL REPORT**

INSTRUCTIONS: This report must be filed in suPERB within 90 days of the conclusion of the fiscal year of the employee organization. All boxes must be completed for the filing to be accepted. *Failure to file a complete report, or falsification of information herein, may result in revocation of certification of the employee organization.*

1. a. NAME, ADDRESS, E-MAIL AND PHONE NUMBER OF **EMPLOYEE ORGANIZATION**:

b. NAME, ADDRESS, E-MAIL AND PHONE NUMBER OF **AGENT FOR SERVICE**:

2. NAMES AND ADDRESSES OF ANY PARENT ORGANIZATION OR OTHER ORGANIZATION(S) WITH WHICH REPORTING ORGANIZATION IS AFFILIATED:

3. DAY AND MONTH ON WHICH FISCAL YEAR ENDS: DAY _____ MONTH _____

4. LIST THE PRINCIPAL OFFICERS AND REPRESENTATIVES OF THE ORGANIZATION: _

Name

Title

5. GIVE THE NAME OF YOUR EMPLOYER AND DESCRIPTION OF THE PUBLIC EMPLOYEES YOUR ORGANIZATION REPRESENTS SEEKS TO REPRESENT:

6. a. CURRENT INITIATION FEES ASSESSED NEW MEMBERS: \$ _____

b. CURRENT DUES ASSESSED MEMBERS: \$ _____ Per Month

7. **BONDING REQUIREMENTS.** In accordance with Iowa Code section 20.25(3)"c" and EAB rule 621 IAC 8.5, every person who handles funds or other property of the employee organization shall be bonded.

a. NAME OF BOND COMPANY: _____

b. NAME(S) OF PERSON(S) INSURED: _____

c. AMOUNT OF BOND: _____

8. **INCLUDE WITH THIS ANNUAL REPORT SUBMISSION A COMPLETE FINANCIAL REPORT AND AUDIT STATEMENT.**

In accordance with EAB subrule 621 IAC 8.2(2), the financial report shall contain, at a minimum, the following information: Cash balance from the previous year; a listing of sources and amounts of income; an identified listing of disbursements; and a closing balance. (A copy of Form LM-2 or LM-3 may be submitted to fulfill this requirement).

In accordance with EAB subrule 621 IAC 8.2(2), the audit shall consist of a statement that the financial report has been reviewed and found to be true and accurate. The audit must be signed by an auditing committee or a person or persons who hold no other office in the employee organization and who did not prepare the financial report.

9. NAME OF OFFICIAL SUBMITTING THIS REPORT

Name: _____

Title: _____

10. THE UNDERSIGNED, ON BEHALF OF THE REPORTING EMPLOYEE ORGANIZATION, PLEDGES TO COMPLY WITH THE LAWS OF THE STATE OF IOWA, TO ACCEPT MEMBERS WITHOUT REGARD TO AGE, RACE, SEX, RELIGION, NATIONAL ORIGIN OR PHYSICAL DISABILITY. THE UNDERSIGNED FURTHER STATES UNDER OATH THAT THE CONTENTS OF THIS REPORT, INCLUDING ANY ATTACHMENTS, ARE TRUE AND ACCURATE.

Signed: _____

Date: _____

Subscribed and sworn to before me this _____ day of _____, 20____, at _____, Iowa.

Notary _____

(Affix Seal)

FINANCIAL REPORT AS REQUESTED IN SECTION 8

FINANCIAL REPORT: This should cover the last completed fiscal year of your local association. It does not need to be particularly complicated. Use this form for smaller locals.

FINANCIAL REPORT

Fiscal Year 20___/ 20___

NAME: _____

INCOME:

| | |
|-----------------------|----------|
| Previous year balance | \$ _____ |
| Other Dues | _____ |
| Unit Dues | _____ |
| Local Dues | _____ |
| Membership Assessment | _____ |
| Interest Earned | _____ |
| Fund Raising Proceeds | _____ |

TOTAL INCOME \$ _____

EXPENDITURES:

| | |
|-------------------------------|----------|
| Unit Dues | \$ _____ |
| Other Dues | _____ |
| Office Supplies and Equipment | _____ |
| Officers Expenses | _____ |
| Committee Expenses | _____ |
| Representatives to Meetings | _____ |
| Social Affairs | _____ |

TOTAL EXPENDITURES \$ _____

| | |
|--------------------|----------|
| TOTAL INCOME | \$ _____ |
| TOTAL EXPENDITURES | \$ _____ |
| NET GAIN (OR LOSS) | \$ _____ |

If there are items listed here that don't apply to your local, leave them out. If some aren't listed but are needed, list them.

AUDIT STATEMENT FOR ANNUAL REPORT SECTION 8

The Employment Appeal Board does not require an “outside” audit. You may use a local committee of **non-officers**. The appointment of the Audit Committee should appear in the minutes of the Executive Board meeting or the minutes of the Representative Assembly meetings.

The members of the Audit Committee, or other non-officer who performs the audit, must sign the following or another similar statement:

We, the undersigned, attest that we do not hold regular elected offices in the _____
_____ local committee and have been duly appointed by the President to audit the
books of the _____ for the _____ fiscal year.

We further attest that we have examined the financial accounts of the _____
_____ and have found those accounts, to the best of our knowledge, to be
accurate and in good order.

Date: _____

Signed: _____

Print: _____

Date: _____

Signed: _____

Print: _____

Date: _____

Signed: _____

Print: _____