

CHAPTER YEAR-END SUMMARY

Within thirty (30) days after the end of the chapter's fiscal year, the outgoing President shall submit this completed form to the National Vice President Chapter Services at vpchapterservices@assistanceleague.org. Save a copy for the chapter files and provide a copy to the incoming President.

Please note: The information to be inserted is for the chapter **and its auxiliaries**.

NOTE: To complete this form on a computer, click on the shaded boxes (fields) and type the information requested. Move between fields using the Tab key or the arrow keys.

Assistance League of Metro Columbus	
Fiscal year ended: 2015-16	Chapter President: Barbara Drake
List names of auxiliaries:	
1.	2.
3.	4.
5.	6.

Philanthropic programs information:						
List all philanthropic programs of the chapter <u>and auxiliaries</u> . List number of persons served, not number of schools, hospitals, etc. Budgeted amounts reported should be for the year being reported upon.						
Name of program	Year started	Group served <i>(see key below)</i>	Area served <i>(see key below)</i>	# of members involved	# of recipients	Program budget
Operation School Bell						
Book Buddies	1999	1	B	8	42	\$1000
Head and Toe	2008	1	D	1	269	\$4500
Assault Survivor Kits						
Hygiene Kits	1999	1, 2	A, D	20	2417	\$4000
Buddy Bears and Books	2010	1	D	2	1338	\$1750
Crisis Clothing & Domestics (formerly Carionf for Each Other)						
	2009	1, 2	D	10	2663	\$14080
PALS (Providing Activities and Laughter for Seniors)						
	2007	3	D	8	75	\$500
Community Outreach						
	2014	1	D	1	1	\$500

Key: **Groups Served** **Areas Served**

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1 = Children (0-18 Years) A = Health
 2 = Adults (18-64 Years) B = Education
 3 = Seniors (65+ Years) C = Cultural
 4 = Families/Other D = Basic Needs

Assistance League of Metro Columbus

Member information:						
	Column A	Column B	Column C	Column D		
	# at beginning of year	# of new members	# of resignations, deaths, non-renewals	# at end of year (Col A + Col B - Col C)	# of service hours	
Chapter members:						
Voting	69	8	2	75	10,752.25	
Nonvoting	3	0	1	2	4	
Auxiliary members:						
Voting						
Nonvoting						
Assistees® members						
Totals					10,756.25	
# of nonmembers utilized during fiscal year: 21			# of nonmember service hours: 266.95			
				Yes	No	N/A
Does the chapter have membership requirements (time and financial) of voting members? Please list or briefly explain membership time and financial requirements (such as dues, hours requirements, # of thrift shop staffings, event ticket purchases) below:				<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Chapter:						
Assistees:						
Auxiliary #1:						
Auxiliary #2:						
Auxiliary #3:						
Auxiliary #4:						

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Chapter compliance checklist:	Yes	No	N/A
1. Are current bylaws and standing rules for the chapter and auxiliary policies (including any amendments for any of the preceding) on file with the national organization?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2. Have the following policies been adopted by the chapter? a. Conflict of interest b. Donor privacy c. Ethics d. Finance e. Gift acceptance f. Investment g. Record retention and destruction h. Social media i. Website privacy j. Whistleblower protection	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
3. Have new members received national and chapter orientation (and auxiliary orientation, if applicable)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4. Does the chapter have adequate insurance to protect the chapter's assets and operations?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5. Have annual corporate (including auxiliaries) budgets been approved by the Board and membership prior to the beginning of the fiscal year?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
6. Does the chapter make available to all, on request, complete annual financial statements and IRS Form 990?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7. Did the Board review the most recently filed IRS Form 990 before it was submitted?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
8. Did the Board review the CPA's management letter returned with the audited financial statements?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Did the chapter provide receipts/acknowledgments to donors for all cash and noncash contributions and obtain valuations of gift-in-kind donations?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Did the chapter disclose the following information on tickets and/or invitations for all fundraising events? a. the amount of the ticket b. fair market value and description for goods and services received, if applicable c. the amount that is tax deductible d. the words "Retain for Tax Purposes" on the portion retained by the donor	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>
11. Did the chapter follow IRS regulations and applicable state and local laws, if any opportunity drawings/raffles were held?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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12.	Did the chapter pay sales tax on fundraising activities (including thrift shops and sales of purchased items) where required by state and local laws?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13.	Are all philanthropic programs identified with the name Assistance League®?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
14.	Have Program Selection Report Forms and agreements been submitted to the National Philanthropic Programs Committee for review for all <u>new</u> philanthropic programs of the chapter and its auxiliaries?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.	Have amendment notices and termination notices of existing philanthropic programs of the chapter and its auxiliaries been submitted to the National Philanthropic Programs Committee?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16.	Have all agreements with other organizations and schools for each philanthropic program of the chapter and its auxiliaries been renewed and updated to reflect current operations within the past three (3) years?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.	Have all agreements with stores been renewed and updated to reflect current operations within the past year?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
18.	Do all marketing communications/public relations and other informational materials include the Assistance League® name and logo?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
19.	Do auxiliary marketing communications/public relations and other informational materials include a statement that identifies the auxiliary as an auxiliary of the chapter?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
20.	Does the use of Assistance League trademarks and designs/logos comply with Registered Trademarks and Rules for Trademark Use and Graphic Standards ?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
21.	If the chapter or auxiliary brochures were updated in the past year, were they submitted to the National Vice President Marketing Communications for review prior to printing?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22.	Does the chapter have an annual report available to all, on request, that includes the following items? a. the chapter's mission statement b. a summary of the past year's program service accomplishments c. a roster of the Board of Directors d. financial information from audited or reviewed financial statements	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
23.	If the chapter's website solicits contributions, is annual report information as listed in #22 above included on the website?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.	If the chapter activated or updated a website during the past year, was it reviewed by the National Chapter Website Reviewer prior to activation?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
25.	Is information on the chapter's website accurate and up-to-date?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
26.	Was a chapter evaluation performed this year?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
27.	Was the chapter's strategic plan updated this year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
28.	Is the chapter's GuideStar profile information accurate and up-to-date?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

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29.	Has the chapter achieved GuideStar's Exchange Gold Participant level?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
30.	Is a current Assisteens® Auxiliary Consent Form on file with the chapter's Assisteens Coordinator for each Assisteens member?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Please provide a brief explanation of any "no" answers to questions 1 through 30:				
2 Investment Policy- We have just one CD and no other investments. No policy at this time.				
27 The strategic plan was not updated- We plan to do this at the beginning of the 2016-17 fiscal year				

List your successes for the year:
1. Completed move to a larger office in September. The new office can house all supplies for all programs, Board and committee meetings can be held in the office and we have the use of a conference room for our regular meetings.
2. We continue to focus on public awareness and community support. We continued membership in one Chamber of Commerce and joined a second Chamber of Commerce.
3. We continued updates on our website. We established a Facebook presence and plan to develop other social media accounts.
4. Continued Gold Star status on Guide Star
5. Decided to not hold our Gala fundraiser and to focus on other ways to bring in money.. We worked with a deficit budget. We managed to raise more other money than was anticipated so the deficit was not as great as we budgeted.
6. Implimented our first mail annual appeal which raised much more money that we anticipated We will continue and hope to expand this activity.
7. Held a Fall Social which was to be a social event but raised unanticipated money so will continue to hold this as a fundraiser. It is much less labor-intense than the Gala.

Barbara Drake

 President's signature

June 27, 2016

 Date

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