

## CHAPTER YEAR-END SUMMARY

Within thirty (30) days after the end of the 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.

<b>Assistance League of</b> Metro Columbus	
<b>Fiscal year ended:</b> 2014-2015	<b>Chapter President:</b> Janet L. Page
<b>List names of auxiliaries:</b>	
1.	2.
3.	4.
5.	6.

<b>Philanthropic programs information:</b>						
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
Assult Survivor Kits						
Hygiene Kits	1999	1,2	A,D	20	1,400	3,000
Buddy Bears	2010	1	D	3	988	2,000
Caring for Each Other-Note Budget dollars were 11,830. Total spent 15,073. Additional funds allowed for add'l spending	2009	1,2	D	5	1,917	11,830.
Operation school Bell						
Book Buddies	1999	1	B	8	40	1,000
Head & Toe	2008	1	d	5	565	5,000
Scholarship	2004	1	B4	1	1	1,000
Kid's Enrichment	2005	1	B,C	1	0	500
Providing Activities & Laughter for Seniors	2007	3	D	7	54	1,000

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**Key:**      **Groups Served**      **Areas Served**  
 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	72	7	10	72	10,089	
Nonvoting	5		2	3		
Auxiliary members:						
Voting						
Nonvoting						
Assisteens <sup>®</sup> members						
Totals						
# of nonmembers utilized during fiscal year:			# of nonmember service hours:			
				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 hours requirements, # of thrift shop staffings, event ticket purchases) below:				<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Chapter:						
Assisteens:						
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. Website privacy i. 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 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"/>	
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"/>
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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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13.	Are all philanthropic programs identified with the name Assistance League®?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
14.	Have <b>Program Selection Report Forms</b> 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 <b>Registered Trademarks and Rules for Trademark Use and Graphic Standards</b> ?	<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 Review Committee 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 a new website during the past year, was it reviewed by the National Marketing Communications Committee 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 checked="" type="checkbox"/>	<input type="checkbox"/>	
28.	Is the chapter's GuideStar profile information accurate and up-to-date?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
29.	Has the chapter achieved GuideStar's Exchange Gold Participant level?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

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30. Is a current <b>Assisteens® Auxiliary Consent Form</b> 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. Investments- We do have CD's but our funds are limited & we do not have a written policy at this time.			

List your successes for the year:
1. Focused on Public Awareness and Communtiy Support. Joined 1 Chamber of Commerce
.2. Established Speakers Bureau and powerpoint presentation. Updated Orientation Handbook.
3. Continued up-dates on Website.
4. Obtained Gold Status with Guide Star
5. Established a written Strategic Plan
5. Moving to larger location in September to house our Philanthropic Projects/Programs.

Janet L. Page  
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 President's signature

7/15/2015  
 \_\_\_\_\_  
 Date

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