

CHAPTER YEAR-END SUMMARY

Assistance League of Bellingham

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 <small>(Col A + Col B – Col C)</small>	# of service hours
Chapter members:					
Voting	100	22	11	108	28785
Nonvoting	24			27	2677.5
Auxiliary members:					
Voting					
Nonvoting					
Assisteens® members					
Totals	124	22	11	135	31462.5
# 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 dues, hours requirements, # of thrift shop staffings, event ticket purchases) below:				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chapter: We require 100 hours per year from members. Voting members pay \$60 per year and non-voting pay \$75 per year.					
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. 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 checked="" 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 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	

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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:				

List your successes for the year:
Teen Team began serving Homeless High School Teens. We provided clothing vouchers to them..
We increased our budget for all Philanthropic Programs
We increased Thrift Shop sales.
We are working on Platinum level Guide Star Status.

Stephanie Sadler

 President's signature

May 26, 2016

 Date

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