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Within thirty (30) days after the end of the chapter's fiscal year, the outgoing President shall complete this form. 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**.

Chapter	Fiscal year ended	Do you have an adult auxiliary?	Do you have an Assisteens auxiliary?	Do you have Community Volunteers?	Do you a Thrift Shop/Retail Shop?
Greater Collin County	2018	No	Yes	Yes	No

Auxiliary	Type	AKA	Status	Start Date
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Auxiliary Type AKA Status Start Date
Assisteens Assisteens Forming 11/08/2017

You don't need to complete form in one sitting, but you do need to go to the last page and click Review, and then Confirm to save your data so that it is available the next time you access the form.

Accomplishments

Our Assisteens auxiliary was formed during the school year of 2017-2018. They started off with a bang with 20 members joining at the kickoff meeting! We are in the process of forming. All that is left is for our chapter By-laws to be amended and they will be official. During this past year Assisteens have met the first Sunday of the month at our office for a short business meeting and then participated in a project. They helped with Caring in Action, making hats for cancer patients and bagged combs and addressed shoe voucher envelopes for Operation School Bell. Their other projects were: Donated items to the troops, volunteered at a church pumpkin patch twice, volunteered at a local Allen nursing home 3 times (made cards, sang Christmas carols, and delivered Valentine's we made at a meeting), donated items to Toys4Tots, they made and donated items to the local ASPCA, picked up trash on some trails and streets in our town, volunteered at Keep Allen Beautiful, and donated canned goods to Allen Community Outreach.

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Philanthropic Programs

For recipients, list number of persons served, not number of schools, hospitals, etc. Budget amounts should be for the year being reported upon. **You can now update program information and add new programs.**

Programs

Program Name	Groups Served	Groups Involved	Category	Type	Status	Year Started	Year Ended
Caring in Action	- Children - Adults - Families	- Chapter - Assisteens	Community Needs	- Clothes - Health - Literacy	Adopted	2014	
# of Members Involved	# of Recipients (people)	Budget	Expenses				
50	542	3000	2419				
Comments							
Program Record ID	Programs StatisticsRecord ID						
a3R1a000009F73EAE	a3W1a000004xQoEAI						

Programs

Program Name	Groups Served	Groups Involved	Category	Type	Status	Year Started	Year Ended
Operation School Bell	- Children	- Chapter - Assisteens	Operation School Bell	- Clothes - Health - Literacy	Adopted	1997	

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Supplies

# of Members Involved	# of Recipients (people)	Budget	Expenses
70	1180	85000	81029

Comments

Program Record ID	Programs StatisticsRecord ID
a3R1a0000009F6zEAE	a3W1a0000004xQtEAI

Programs

Program Name	Groups Served	Groups Involved	Category	Type	Status	Year Started	Year Ended
Outreach	- Children - Adults - Families	- Chapter	Community Needs	- Clothes - Health - Hunger - Literacy - Supplies	Adopted	2011	

# of Members Involved	# of Recipients (people)	Budget	Expenses
0	0	0	0

Comments

This program is designed for a one time project. It is used in emergency situations and is funded when the need arises.

Program Record ID	Programs StatisticsRecord ID
a3R1a0000009F72EAE	a3W1a0000004xQyEAI

Programs

Program Name	Groups Served	Groups Involved	Category	Type	Status	Year Started	Year Ended
Pass the Word	- Children - Adults - Families	- Chapter	Community Needs	- Literacy	Adopted	1996	

# of Members Involved	# of Recipients (people)	Budget	Expenses
18	5000	2700	2440

Comments

Program Record ID	Programs StatisticsRecord ID
a3R1a0000009F70EAE	a3W1a0000004xR3EAI

Programs

Program Name	Groups Served	Groups Involved	Category	Type	Status	Year Started	Year Ended
Wee Memories	- Families	- Chapter	Community Needs	- Clothes	Adopted	2000	

# of Members Involved	# of Recipients (people)	Budget	Expenses
15	75	1500	662

Comments

Program Record ID	Programs StatisticsRecord ID
a3R1a0000009F71EAE	a3W1a0000004xR8EAI

What vendors/stores do you use?

- Payless Shoes

<p>Question Have Program Amendment Notice forms for existing philanthropic programs of the chapter and its auxiliaries been submitted to the National Philanthropic Programs Committee when amending a program?</p>	<p>Response Yes</p>
<p>Question Has your chapter completed the Operation School Bell Outcomes Summary Results Survey on the national website?</p>	<p>Response Yes</p>
<p>Question Have Agreements with an Organization, District/School or a Store forms for each philanthropic program of the chapter and its auxiliaries been submitted to the National Philanthropic Programs Committee when securing agreements for a program?</p>	<p>Response Yes</p>
<p>Question Have Program Termination Notice forms for existing philanthropic programs of the chapter and its auxiliaries been submitted to the National Philanthropic Programs Committee when terminating a program?</p>	<p>Response Yes</p>
<p>Question Have Program Selection Report forms been submitted to the National Philanthropic Programs Committee when initiating a program?</p>	<p>Response Yes</p>
<p>Question Are all philanthropic programs identified with the name Assistance League?</p>	<p>Response Yes</p>

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Membership

Member Service Hours

Voting Adult Service Hours	Nonvoting Adult Service Hours	Assisteens Service Hours
10143	207	175

Community Volunteer Statistics

Service Hours	# of Volunteers	What type of Service?
146	8	- Ongoing

Expectations

Financial Expectations/requirements other than dues
none

Hours Expectations/requirements (Voting, Nonvoting, Auxiliary, Other)
none

Service Expectations (committees, meetings, programs)
All voting members serve on a committee and on Operation School Bell.

Dues \$/yr (Voting, Nonvoting, other)
Voting \$80, non-voting \$130, Assisteens \$20

Governance

Membership classifications other than Voting, NonVoting
none

Does the chapter have term limits for Board Positions?
Two years

Does the chapter have term limits for Chair positions?
None

Number of members on Advisory Council?

8

Member Orientation

How often does chapter have Orientation?

As needed

What method is used for Orientation?

- One on One

- Class

Awards

What awards does chapter give?

- Ada Edwards Laughlin

- Operation School Bell

Background Screenings

Does your chapter conduct background screenings?

- No One

Who is your vendor?

Networking Events

Did your chapter attend/plan to attend a networking event in 2018?

- June 2018 - Texas Networking

Membership Questions	Question	Response
	Is a current Assiteen's Auxiliary Consent Form on file with the chapter's Assisteens Coordinator for each Assisteens member?	Yes

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Finance

Do you have any paid staff?

- None

Insurance

Have you reviewed your insurance in the past year to insure adequate coverage?

Yes

Do you have cybersecurity insurance?

No

Do you have child protection insurance?

No

Please provide any comments you may have regarding insurance.

Date annual chapter budgets, including auxiliaries, approved by membership
04/18/2018

Question Response

Are the chapter's most current annual financial statement and IRS Form 990 available on the chapter's website? Yes

Question Response

Did the Board review the CPA's management letter returned with audited financial statements? Yes

Question Response

Did the Board review the most recently filed IRS Form 990 before it was submitted? Yes

Do you use a donor database to track donors and donations?

Is the Charitable Solicitation Registration current in all states in which the chapter is required to register?

Please list vendor if you use one.

Did the chapter disclose the following information on tickets and/or invitations for all fundraising events?

DonorPerfect

Yes

- Amount of ticket
 - Fair market value
 - Description of goods/services
 - Amount tax deductible
 - Words "retain for tax purposes" on portion retained by donor

Question

Did the chapter follow IRS regulations and applicable state and local laws, if any opportunity drawings/raffles were held?

Response

Yes

Question

Did the chapter provide receipts/acknowledgments to donors for all cash and noncash contributions and obtain valuations of gift-in-kind donations?

Response

Yes

Question

Has the chapter established a planned giving program? No

Response Explanation

Question

Did the chapter pay sales tax on fundraising activities (including thrift shops and sales of purchased items) where required by state and local laws?

Response

Yes

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Strategic Planning

GuideStar level designation achieved
Gold

Date chapter GuideStar profile was last updated?
06/06/2018

What is the term of your strategic plan?
Three years

Date strategic plan was last updated?
06/01/2015

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Marketing Communications

Date of last update made to chapter website information
06/20/2018

Question

If the chapter's website solicits contributions, are chapter's mission statement, summary of past year service accomplishments, roster of Board of Directors, and financial information included on the website?

Response

Yes

Question Response
Does the use of Assistance League trademarks and designs/logos comply with Registered Trademarks and Rules for Trademark Use and Graphic Standards? **Yes**

Question Response
Is information on the chapter's website accurate and up-to-date? **Yes**

Question Response
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? **N/A**

Question Response
Do all marketing communications/public relations and other informational materials include the Assistance League® name and logo? **Yes**

Question Response
Do auxiliary marketing and communications/public relations and other informational materials include a statement that identifies the auxiliary as an auxiliary of the chapter? **N/A**
Technology

What Office Productivity Suite do you use? Office 365	Do you use an email marketing tool? Constant Contact	Do you use an Operation School Bell tool for scheduling students?	Do you use a tool for scheduling volunteers?	Do you use a tool for tracking volunteer hours? - Spreadsheet
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Question Response Explanation
Does your chapter use role based emails? **No**

Question Response Explanation
Does your chapter have an email policy? **No**

Question Response Explanation
Does your chapter use TechSoup? **No**

Are you ready to submit this form and load the required files?
Yes
If not, click Review, scroll down to the bottom of form that is displayed and then click Confirm to save your changes. You will be then be able to retrieve your saved data to complete the form at a later time.

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