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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?	YES Started For	Do you have an Assisteens auxiliary?	Do you have Community Volunteers?	Do you a Thrift Shop/Retail Shop?
Greater Collin County	2019	No	2019	Yes	Yes	No

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

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! All documentation including Chapter Bylaws and Standing Rules was finalized during the 2018-2019 school year. During this past year Assisteens have met the fourth Sunday of the month at our office for a short business meeting and then participated in projects listed below: - Participated in Allen Teen Court. - Volunteered at Samaritan Inn on multiple occasions by making sandwiches and packing snacks / lunches for individuals in need. - Maintained assigned "Adopt a Highway"; - Supported Operation School Bell by bagging combs. - Supported Caring in Action Program by putting Assistance League of Greater Collin County "tags" on blankets for students at Haggard Middle School and on CAPS for children undergoing medical treatment at Children's Medical Center in Plano. - Made and delivered Valentines for senior living center(s). - Made pet toys from scrap fabric (used all of the scraps from our fleece blanket project which turned waste materials into re-cycled project goods) and delivered them the Plano animal shelter. - Supported our North Texas Giving Day Fundraiser by providing games and toys for children accompanying parents to the event. - Sorted and put school supplies in backpacks for Allen Community Outreach. Activities they participated in over the summer: on 8/8 - 10 volunteers sorted and put school supplies in backpacks at Allen Community Outreach and on 6/28 - 8 volunteers completed the training and received the necessary equipment to do the clean-up on their adopted "highway". - Volunteered at Allen's CERT (Community Emergency Response Training) where they acted as the "victims".

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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.

Programs										
Program	Status	Year Started	Year Ended	Groups Served:	Groups Involved:	Category:	Type:	Comments	Program Name	Record ID
Caring in Adopted Action		2014		- Children - Adults Families	- Chapter Assisteens	Community Needs	Community- Clothes - Health - Literacy	The Caring in Action Program provided the following services: 30 Warm Feelings: 30 fleece blankets, 100	PGM-02421	a451P000000DI

binders, deodorant, and various school supplies and snacks for children in need at Haggard Middle School. - Dr. Seuss Day: 30 members participated in Dr. Seuss Day by reading books to all 1st grade students at Christie Elementary School in Plano ISD and Burks Elementary School in McKinney ISD. Our chapter donated over 200 Dr. Seuss books to each of the children in those 1st Grade classes and full sets of Dr. Seuss books to the libraries at both schools. - Hi and Dry: We packaged and delivered 2100 pairs of underwear to 38 Title I schools in 7 school districts within Greater Collin County. The underwear is delivered to the school nurses to provide a change of clothes to children who have accidents -- especially during the first couple of weeks of the school year. - Children's Medical Center in Plano: We decorated and delivered 195 caps for children undergoing serious medical treatment such as cancer treatments ; Crafts for a Cause created 55 "loveys," 33 hand puppets, 51 baby blankets for the hospital. - Emily's Place/Grandfriend's Day: We conducted a party for 20

children and 10 mothers living in the house. Each child participated in an art project, received a gift and a hand puppet and enjoyed decorating / eating cupcakes and juice. The mothers each received a handcrafted afghan. 15 members and spouses participated. We also stocked Infants Closets their two houses.

# of Members Involved	# of Recipients (people)	Budget	Expenses	Program Statistics Name
44	2794	6900	5868	PS-00381

Programs

Program	Status	Year Started	Year Ended	Groups Served:	Groups Involved:	Category:	Type:	Comments	Program Name	Record ID
Operation Adopted School Bell		1997		- Children-	- Chapter Assisteens	Operation-School Bell	- Clothes - Health Literacy - Supplies	We served 7 school districts within Greater Collin County -- Allen, Frisco, Lovejoy McKinney, Plano, Prosper and Wylie. We delivered clothing to 1079 elementary school clients referred to us by the counselors in those school districts.	PGM-02422	a451P00000DhQFQA0

# of Members Involved	# of Recipients (people)	Budget	Expenses	Program Statistics Name
56	1079	109600	81183	PS-00383

Programs

Program	Status	Year Started	Year Ended	Groups Served:	Groups Involved:	Category:	Type:	Comments	Program Name	Record ID
Outreach Adopted 2011				- Children - Adults - Families	- Chapter Community- Needs			This program is designed for a one time project. It Literacy is used in emergency situations and is funded when the need arises. This year we delivered 1660 pairs of adult socks to the Salvation Army Plano Overnight Warming Station and to the City of Plano for Collin County Homeless Individals.	PGM-02423	a451P000000DhQGQA0
		# of Members Involved	# of Recipients (people)	Budget	Expenses	Program Statistics Name				
		7	1660	276	1325	PS-00384				

Programs

Program	Status	Year Started	Year Ended	Groups Served:	Groups Involved:	Category:	Type:	Comments	Program Name	Record ID
Pass the Word Adopted 1996				- Children - Adults - Families	- Chapter Community- Needs			Pass the Literacy Word runs 12 months a year delivering magazines to patients and waiting rooms at Plano Presbyterian Hospital. The hospital has a potential of 368 patients and, on average, there are	PGM-02424	a451P000000DhQHQA0

around 300 patients in the hospital on any given day. We deliver to 1/2 of the patients on each of two days per week -- Tuesdays and Thursdays plus the six (6) Waiting Rooms on Mondays and Wednesdays.

# of Members Involved	# of Recipients (people)	Budget	Expenses	Program Statistics Name
24	16000	3700	2693	PS-00385

Programs

Program	Status	Year Started	Year Ended	Groups Served:	Groups Involved:	Category:	Type:	Comments	Program Name	Record ID
Wee Memories	Adopted	2000		- Families	- Chapter	Community-Needs	Clothes	The Wee Memories program provides bereavement Memory Boxes for parents whose babies have died at or near birth at Texas Health Presbyterian Hospital Plano. We deliver the boxes to the hospital when they request additional supplies. This year we delivered on two occasions -- 20 boxes and 25 boxes.	PGM-02425	a451P000000DhQIQAO

# of Members Involved	# of Recipients (people)	Budget	Expenses	Program Statistics Name
7	45	1500	993	PS-00386

What vendors/stores do you use?

- JCPenney

- Payless Shoes
- Other

Other

Fruit of the Loom, Hanes, Ultimate Apparel, CIT Group/Commercial Services, Smith Distributors

Question Response
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? **Yes**

Question Response
Are all of your agreements up-to-date? **Yes**

Question Response
Has your chapter completed the Operation School Bell Outcomes Summary Results Survey on the national website? **Yes**

Question Response
Have all of your new agreements with an Organization, District/School or a Store been submitted to your National Philanthropic Programs Consultant? **Yes**

Question Response
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? **Yes**

Question Response
Have Program Selection Report forms been reviewed by your National Philanthropic Programs Consultant when initiating programs and submitted once signed? **Yes**

Question Response
Are you using the new Self-Renewing Fillable agreements? **No**

Explanation
The Self-Renewing Fillable agreements were not ready for our use last year when we generated our agreements. We worked with the our National Philanthropic Programs Consultant to create all of our documents.

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Membership

Member Service Hours		
Voting Adult Service Hours	Nonvoting Adult Service Hours	Assistees Service Hours
12486	313	126

Community Volunteer Statistics		
Service Hours	# of Volunteers	What type of Service?
36	8	- Once and done

Expectations

Financial Expectations/requirements other than dues
All members are expected to participate in all fundraisers. We do not identify a minimum dollar amount -- only that they participate / support each event. E.g. attend or sell tickets for events such as our Spring Fund Raiser Luncheon, Game Day, etc.; Donate to our organization during our major

fundraising giving day -- North Texas Giving Day.

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?

10

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 2019?

- June 2019 - Texas Networking

- Other

Networking - Other

We hosted the annual event in Texas and expanded the event to include Oklahoma this year.

Regular Meetings

Please select the time of your regular chapter meetings:

Week: Day:
Third Wednesday

Membership Questions	Question	Response
	Is a current Assisten's Auxiliary Consent Form on file with the chapter's Assistees Coordinator for each Assistees 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.

Do you own:

Do you lease:

- Office space**
- Meeting space**
- Philanthropic storage space**

Date annual chapter budgets, including auxiliaries, approved by membership
04/17/2019

Question	Response
Has the chapter Board designated a portion of unrestricted net assets for expansion, building, equipment or other use?	N/A

Question	Response
Does the chapter document internal control procedures?	Yes

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

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

Do you use a donor database to track donors and	Other Donor DB	Is the Charitable Solicitation Registration current in all states in which the chapter is required	Please list vendor if	Did the chapter disclose the following information on tickets and/or invitations for all
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donations?	to register?	you use	fundraising events?
		one.	
Other	Constant	Yes	
	Contact and		
	Quickbooks		
			<ul style="list-style-type: none"> - Amount of ticket - Fair market value - Description of goods/services - Amount tax deductible - Words "retain for tax purposes" on portion retained by donor

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

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

Question Response
Was the Resale Shop Survey updated at your chapter's fiscal year end? N/A

Question Response
Has the chapter established a planned giving program? **Yes**

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

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Strategic Planning

GuideStar level designation achieved
Gold

What is the term of your strategic plan?
Three years

Seq Question Response
26 Does the strategic plan include a mission and vision statement and core values? **Yes**

Seq Question Response
27 Does the strategic plan include goals and strategies? **Yes**

Seq Question Response
28 Does the strategic Plan include action plan steps associated with the goals and strategies? **Yes**

Seq Question Response
29 Has the chapter adopted the shared National mission and vision statements and tagline? **Yes**

Seq Question Response
30 Does the chapter have a strategic planning Vice President or Chairman? **Yes**

Seq Question Response
31 Is the strategic planning Vice President or Chairman a voting member of the Board? **Yes**

Seq Question Response
32 Does the chapter have a one-page strategic plan summary? **Yes**

Seq Question Response
33 Is the one-page strategic plan summary available on the public side of the chapter website? **Yes**

Seq Question		Response
34	Is the strategic plan used in developing the chapter annual budget? Yes	
Seq Question		Response
35	Are all chapter members involved in strategic plan development and implementation? Yes	
Seq Question		Response
36	Does the chapter have a process to (at least) annually review strategic plan goals, strategies and the action plan?	Yes
Seq Question		Response
37	Does the Board regularly review the strategic plan and use it to direct decision making? Yes	
Seq Question		Response
38	Is the chapter GuideStar organizational profile updated at least every 18 months? Yes	
Seq Question		Response
39	Is the GuideStar level designation widget displayed on the public side of the chapter website?	Yes

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Marketing Communications

Date of last update made to chapter website information
06/01/2019

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?		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
Do you have a community newsletter? N/A	

Question		Response
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?		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?		Yes

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? Operation School Bell	Do you use a tool for scheduling volunteers? Operation School Bell	Do you use a tool for tracking volunteer hours? - Spreadsheet
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Question	Response	Explanation
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Does your chapter use role based emails? No

Question Response Explanation

Does your chapter have an email policy? No

Question Response

Does your chapter use TechSoup? Yes
