

PRESIDENT'S YEAR-END SUMMARY

Assistance League of Pomona Valley

Member information:					
	# at beginning of year	# of new members	# of resignations	# at end of year	# of service hours
Chapter members:					
Voting	28	0	1	27	4586.5
Nonvoting	41	0	0	41	500
Auxiliary members:					
Voting	6	0	0	6	See below
Nonvoting	53	0	1	52	2976.5
Assisteens [®] members	0	0	0	0	0
Totals	128	0	2	126	8063
# of nonmembers utilized during fiscal year:		15	# of nonmember service hours:		165

Fundraising information:		
List all fundraising activities (retail, events, solicitation, grants and other contributions) of the chapter and auxiliaries. Identify events by type and by name of the event (e.g., Shoot for the Stars/golf tournament).		
	Net surplus (after expenses)	Description of activity or event
Retail:		
Thrift		
Consignment		
Gift/Costume		
Sales of items ¹	1500	Scrip sales
Sales of items ¹	335	Rotary ticket sales
Sales of items ¹	660	Hafif Concerts
Events:		
Golf Tournament	77,000	
Spring Tea	6088	
Direct mail/solicitations:		
Helping Hands solicitation	2072	
Grants:		
CDBG	2500	
Other contributions <u>not</u> included above: ²		
Auxiliary Donations	11,600	
Misc. Donations	400	
¹ Include sales such as poinsettias, candy, cookbooks, soup mixes, etc. ² Include endowments and donations from memorials, individuals, corporations, foundations, etc.		

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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?	X	<input type="checkbox"/>	
2. Have the following policies been adopted by the chapter? a. Chapter finance b. Investment c. Conflict of interest d. Donor privacy e. Website privacy f. Ethics g. Record retention and destruction h. Whistleblower protection	X X X X X X X X	<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)?	X	<input type="checkbox"/>	
4. Does the chapter have adequate insurance to protect the chapter's assets and operations?	X	<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?	X	<input type="checkbox"/>	
6. Does the chapter make available to all, on request, complete annual financial statements and IRS Form 990?	X	<input type="checkbox"/>	
7. Did the Board review the most recently filed IRS Form 990 before it was submitted?	X	<input type="checkbox"/>	
8. Did the Board review the CPA's management letter returned with the audited financial statements?	X	<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?	X	<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	X X X X	<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?	X	<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?	X	<input type="checkbox"/>	<input type="checkbox"/>

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13.	Are all philanthropic programs identified with the name Assistance League®?	X	<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?	X	<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 type="checkbox"/>	X
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?	X	<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"/>	X
18.	Do all public relations and other informational materials include the Assistance League® name and logo?	X	<input type="checkbox"/>	
19.	Do auxiliary public relations and other informational materials include a statement that identifies the auxiliary as an auxiliary of the chapter?	X	<input type="checkbox"/>	<input 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 ?	X	<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 type="checkbox"/>	<input type="checkbox"/>	X
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	X X X X	<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 type="checkbox"/>	<input type="checkbox"/>	X
24.	If the chapter activated a new website during the past year, was it reviewed by the National Public Relations Committee prior to activation?	<input type="checkbox"/>	<input type="checkbox"/>	X
25.	Was a chapter evaluation performed this year?	X	<input type="checkbox"/>	
26.	Was the chapter's strategic plan updated this year?	X	<input type="checkbox"/>	
27.	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"/>	X

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Other information:		Yes	No	N/A
28.	Does the chapter have membership requirements (time and financial) of voting members? Please list or briefly explain membership time and financial requirements below:	X	<input type="checkbox"/>	
Chapter: Dues, event financial obligation (voted on annually), committee involvement				
Assistees:				
Auxiliary #1: Dues, event financial obligation (voted on annually)				
Auxiliary #2: Dues				
Auxiliary #3: Dues				
Auxiliary #4:				
Please provide a brief explanation of any "no" answers to questions 1 through 27:				

List your successes for the year:
Strategic Plan created
Positive chapter visit
Successful Golf Tournament fundraiser
Plans made for trial blending of voting chapter and Les Fleurs auxiliary in upcoming year
Philanthropies continue to serve comparable numbers of children and families
New website under construction
Act of Giving became official as new philanthropy
Lazy Susans auxiliary created and presented "The Way We Were", an oral history of our chapter's early days

Lynne Kirchhoff
President's signature

June 30, 2013
Date

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