

## PRESIDENT'S YEAR-END SUMMARY

Within thirty (30) days after the end of the fiscal year, submit this completed form to the National Vice President Chapter Services at vpchapterservices@assistanceleague.org. **Please note:** The information to be inserted is for the chapter **and its auxiliaries**. Save a copy for the chapter files and provide a copy to the incoming President.

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 Pomona Valley</b>	
<b>Fiscal year ended:</b> May 31, 2014	<b>Chapter President:</b> Sharon A. Goodrich
<b>List names of auxiliaries: Year One of Reorganization</b>	
1. Les Fleurs – in transition	2. Lazy Susans
3. High Nooners– in transition	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
Dental Center	1986	1	A,B,D	41	516*	80,150
Operation School Bell®	1998	1	A,B,D	70	1,083	16,000
Act of Giving	2013	1,4	D	30	31 Families**	200
Hygiene Kits	2005	1,4	A,D	25	320 Families**	200
Community Clothes Closet	1989	4	D	9	623	450
Assault Survivor Kits®	1993	1,2	A,D	3	40	200
Cubs for Kids	1988	1	D	17	78	300
Books for Kids	2013	1	B	36	263	2,000
Children's Advocacy Center	2011	1,4	A,D	2	768	200

**Key:**

<b>Groups Served</b>
1 = Children (0-18 Years)
2 = Adults (18-64 Years)
3 = Seniors (65+ Years)
4 = Families/Other

<b>Areas Served</b>
A = Health
B = Education
C = Cultural
D = Basic Needs

\* Each recipient was provided a minimum of 3 treatments during multiple appointments

\*\* Santa sacks & hygiene supplies distributed 1 per family

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<b>Member information:</b>					
Year One of Reorganization	# at beginning of year	# of new members	# of resignations	# at end of year	# of service hours
Chapter members:					
Voting	27	15		42	7,365
Nonvoting	41	0	3	38	920
Auxiliary members:					
Voting	6	0	0	0	0
Nonvoting	52	0	0	24	215
Assisteens® members	N/A	N/A	N/A	N/A	N/A
Totals	126	15	3	104	8,500
# of nonmembers utilized during fiscal year:		24	# of nonmember service hours:		480

<b>Fundraising information:</b>		
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 <sup>1</sup>	2,262	Script Sales
Sales of items <sup>1</sup>	880	Hafif "Concert Under the Stars" Fundraiser
Sales of items <sup>1</sup>	365	Rotary Booth
Events:		
Golf Tournament	85,735	"Smile With a Child" Golf Tournament
Direct mail/solicitations:		
Helping Hands Solicitation	3,386	Books 'n Bears
Grants:		
CDBG	2262	
Other contributions <u>not</u> included above: <sup>2</sup>		
Auxiliary Donations	6,177	
Misc. & On-line Donations	10,574	(e.g. Rock of the Foothills, Huff Foundation, etc.)

<sup>1</sup> Include sales such as poinsettias, candy, cookbooks, soup mixes, etc.

<sup>2</sup> Include endowments and donations from memorials, individuals, corporations, foundations, etc.

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<b>Chapter compliance checklist:</b>		<b>Yes</b>	<b>No</b>	<b>N/A</b>
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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	b. Donor privacy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	c. Ethics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	d. Finance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	e. Gift acceptance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	f. Investment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	g. Record retention and destruction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	h. Website privacy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	i. Whistleblower protection	<input checked="" 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?			<input type="checkbox"/>
	a. the amount of the ticket	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	b. fair market value and description for goods and services received, if applicable	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	c. the amount that is tax deductible	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	d. the words "Retain for Tax Purposes" on the portion retained by the donor	<input checked="" 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 type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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<b>Chapter compliance checklist:</b>		<b>Yes</b>	<b>No</b>	<b>N/A</b>
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 type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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"/>	<input type="checkbox"/>	<input checked="" 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 public relations and other informational materials include the Assistance League® name and logo?	<input checked="" type="checkbox"/>	<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?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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 type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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 Public Relations Committee prior to activation?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.	Was a chapter evaluation performed this year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
26.	Was the chapter's strategic plan updated this year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
27.	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"/>

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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:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Chapter: Dues, committee membership, opportunity baskets				
Assistees: N/A				
Auxiliary #1: Dues, fundraisers				
Auxiliary #2: Dues				
Auxiliary #3: Dues				
Auxiliary #4				
Please provide a brief explanation of any "no" answers to questions 1 through 27:				
2.e Not yet implemented. Draft to be reviewed at the August board meeting.				
25 Chapter review was completed in 2013. Quarterly updates have been provided to AL consultant				
26 Plan submitted and waiting NAL approval. Plan reflects current goals and is being implemented				

List your successes for the year:
Strategic Plan year 1 implemented
Act of Giving year 1 implemented
Website created, approved and updated monthly or more often as needed
Philanthropies continue to serve comparable numbers of children and families
The process of blending voting chapter and Les Fleurs auxiliary was initiated
Make A Difference Day collected over 2,300 books for distribution to children receiving Operation School Bell and Dental Center services
Successful "Smile With a Child" Golf Tournament fundraiser with 38 of 40 members working the event
"Helping Hands" solicitation letters yielded an all time high of \$4,729
Networking and "Branding" our organization within the community

  
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 President's signature

June 30, 2014  
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 Date