



End-of-Year Chapter Summary and Future Plans Guidance to Complete This Form

The ACBS Board and Headquarters Staff need information and data in order to make decisions to guide the ACBS organization as a whole and to help the individual chapters. **The information requested on this form is absolutely essential** to help us perform our duties and to determine courses of action. The form is completed online using Survey Monkey. Some fields are optional and others are required. We are using this format so that those needing this information to make decisions can easily analyze the data. It is also a good tool for Chapters to analyze their own progress over the past calendar year.

Please, please, please complete the End-of-Year Chapter Summary in a timely manner—**on or before February 3, 2023—at which time the survey will expire**. We are providing this additional information to assist you in completing the online survey. We recommend you read this guidance document and collect the required data **PRIOR** to entering it on the online survey. It will go a lot faster if you will take the time to do this. The items starred REQUIRE a response. You will not be able to go past this question until you answer it.

NOTE: for the purpose of this report, a co-member is considered a member. This report is for the past calendar year--2022. The term "current calendar year" refers to 2023.

*****IMPORTANT*****

Read these guidelines. Collect and make notes on needed data. Have this information handy when you do the survey online. You may go back in and edit your responses up until the cutoff date.

Organizational Section

The first few questions are about the legal and organizational status of your chapter.

1. *Name of your chapter—please use the full, proper name of your chapter—no acronyms.
2. *EIN-- IRS Federal Employer Identification Number or Tax ID Number. If you open a bank account in the Chapter's name, you will be required to have an EIN.
3. *Is your chapter incorporated? If you are not incorporated in one or more states, we encourage you to consider as incorporating provides some legal protection for the officers and board. If you are incorporated and your state requires yearly reports or filings—make sure your chapter is in compliance.
4. If you are incorporated, list the state or state(s) in which you are incorporated.
5. *If you are a 501(c)3 nonprofit?
6. If yes, provide year of IRS designation letter AND the date you last filed the required 990 form. You are at risk of losing your designation if you do not file the form 990 as required.
7. *Are you a 501(c)7 nonprofit corporation?

8. If yes, provide year of IRS designation letter AND the date you last filed the required 990 form. You are at risk of losing your designation if you do not file the form 990 as required.
9. *Most chapters will have a fiscal year of Jan 1 to Dec 31 (see your bylaws). If it is something other than that, please list the from/to dates of your fiscal year.
10. *How many members did you have on January 1st and how many members did you have on December 31st.
11. *Number of really active members—we are not going to define this—this is your call. Criteria you might use: attendance at meetings/events, serving as officer or director, filling a function or serving on a committee, volunteer hours put in helping the Chapter and/or ACBS. How many really active members did you have on January 1st and how many really active members did you have on December 31st
12. *What was the balance in your chapter checking account: as of January 1st and also as of December 31st?
13. If you had a chapter savings account, what was the balance as of January 1st and also as of December 31st?
14. If your chapter had other funds or investments (e.g., stocks, endowments, land, buildings) what was their total value as of December 31st?
15. What amount, if any, did your chapter donate to the ACBS scholarship fund? Donations examples: your chapter sends ACBS a check for the ACBS scholarship fund; your chapter donates something for ACBS to raffle to benefit the scholarship fund.
16. Scholarships—if your chapter directly provides money to a school for scholarships to boating related skills training program—list that amount here (for the past calendar year).
17. What amount, if any, did your chapter donate to community or other organizations this past year for programs and projects? (Examples: Sea Scouts, Coast Guard Auxiliary, US Power Squadron, local lake association, etc.)
18. Youth development program—if your chapter runs its own youth development program, list the amount you spent on in for the past calendar year.
19. *Chapter Dues—what will your chapter dues be for the current calendar year?
20. *We know chapters may have many names for their various committees. We are listing a few generic titles. Please fit your committees into these groupings. Even if you just have one person that preforms this function, list it as a committee. If the committee title just doesn't fit in any, list the name as other. Mark none or mark all that apply.

Financial Section

21. *Does your chapter do an annual budget? It is important for every chapter to do a budget for the year. It does not have to be elaborate and it certainly can be modified during the year. If your chapter did not do one for the prior year, there is still time to do one for the current year.
22. *Does your Treasurer present a financial report at least quarterly to the Board? It is important for Chapter leaders to know their financial status. The Treasurer should provide chapter leadership with financial reports at least quarterly—monthly is even better—even if the Board is not meeting that month. Best practice advice:
 - two or more officers to be signatories on the Chapter's checking/savings accounts in case something happens to the signatory
 - Set it up with the bank for the signatories to both have electronic access to the account to view the statements and to be notified of disbursements.

- The Treasurer should have some way to track expenses against the budget and to compare his/her data to the bank statement.
- Treasurer should download the monthly bank statement and send it to at least the officers along with his/her data that provides details on expenditures.
- Given the problem with spammers today, best to have a procedure in place for requests for payments.

Social Section

23. *Does your chapter have a newsletter or other publication? Periodic publications are a good way to keep members informed and engaged. They don't have to be elaborate or polished. We recommend monthly, but understand if this is not feasible for your chapter.
24. If you answered yes, to the above question, tell us a little about the publication.
25. *Does your chapter have a website? We recommend websites—but more importantly they need to be up-to-date. Today, people interested in your chapter will search the web for your website. Think about what it says about your chapter if all the public sees is dated information (or even information that they can't tell if it is dated).
26. If you answered yes to the above, please provide the web address for your website.
27. *Does your chapter maintain a social media presence? Younger people are using social media. If you do have a social media presence—again you need to keep it current. Won't benefit your chapter much if the information/pictures are old.
28. If you answered yes to the above, please provide the details (what platform, etc.)
29. *How many Board meetings (in person or electronic) did your chapter hold last year?
30. *Did your chapter hold an annual meeting for members?
31. *Did your chapter hold its own boat show in the past calendar year? There is no expectation that chapters hold boat shows yearly, but if yours did, we'd like to know about it.
32. Please provide a short narrative on any boat show that your chapter held.
33. If you answered yes to question #31, we'd also like to know:
 - a. if you judged the boat show and used ACBS standards and
 - b. who (by name) judged the boats as we are looking to improve this process.
34. *Please list and a few details about events your chapter held during the past year (other than Board/Chapter meetings). We are hoping to compile a list of ideas for other chapters.
35. *We'd like to know if your chapter collaborated with or supported another ACBS chapter. For example, did you publicize another chapter's boat show or other event. Did you jointly host a workshop or rendezvous or outing? Please list those events.
36. *Please tell us if you collaborated with another organization on an event or outing. For example, the Antique Outboard Motor Club, Inc.; Traditional Small Craft Association; a Marque club; Maritime Museum; Community College; Sea Scouts; Sailing Club; etc. Please list those events.

Recognition Section

37. *We encourage to recognize members who help the chapter achieve its objectives. We hope to use your chapter's internal awards as examples for other chapters. (And funny awards count as well!) Did your chapter give any internal awards or recognize chapter members this past year?
38. If you answered yes to the above questions, please provide details. We may want to share your information with other chapters.

39. *When appropriate, we encourage your chapter to submit the chapter and its members for ACBS awards and recognition. Did you apply for any this past year?
40. If you answered yes to the above question, please provide details (even if the award was not won).

Chapter Health Section

41. *We don't want to provide explicit instructions—just pick the word that you think best exemplifies your chapter's overall health.
42. *Please write a paragraph explaining your reasoning for the rating given
43. *Almost every chapter has one or more issues that they struggle with. Please tell us about yours.
44. *We strongly advise having a plan of work/activities for the year. Plans can always be changed, but your chapter is more likely to achieve results if you work from a plan. Do you have a calendar of events plan for the current calendar year that just started?
45. If you answered no to the above question, why no calendar of events?
46. *If there is something specific that you think that ACBS Headquarters can do to help your chapter, please give us your thoughts. Your ideas might help us to help other chapters.

Chapter Essential Data Section

For this section, we recommend you have the names and email addresses of your officers handy. We strongly suggest that you copy and paste email addresses and phone numbers to prevent mistakes. If possible, we would prefer to have a cell number for the individual.

ACBS Headquarters has absolutely no way of knowing who your officers and directors are for the current year unless you tell them. This information needs to be updated yearly, even if there were no changes from the prior year.

47. *Provide names, cell numbers and email addresses for your officers (as of December 31st)
48. *Does your chapter have any directors?
49. If you answered yes to the above question,
 - a. How many director positions are there?
 - b. Of those, how many are open (unfilled)?

ACBS Headquarters has the capability of allowing up to four individuals per chapter to access the reports and data on the member portal, but staff need to know from each chapter who is authorized to do so. Please list at least two, but up to four members. If one or more of these is a co-member—he or she will need to contact staff to get his/her own password for access.

50. *Provide the name and email address of two to four persons who will be allowed to access your chapter's ACBS database (administrative privileges).

We know there are many Presidents and Vice-Presidents who are hard to reach due to commitments so ACBS staff would like to know the name of one person who can quickly respond to questions.

51. *Please provide that name, cell number and email address.
52. *Lastly, we need the name of the individual who completed this report online and the date it was done.

We know this may seem to be a lot of information, but the Chapter Development Committee vetted the form and format. The CDC conducted several tests and found that it was not time-consuming except for when information had to be researched.

Unfortunately, the program does not allow you to print your responses, but you can go back to review or change an answer up until the time that the survey is closed. We will send each chapter completing the report online a copy of their own report as well as a summary of the findings. The survey will be open until February 3, 2023 when it will automatically close.

Thank you for taking the time to provide this information!

Now that you have read these guidelines, we will send you a Survey Monkey link to the online ACBS Chapter End-of-Year Summary and Future Plans survey.