

ACBS Chapter End-of-Year Summary 2023--Instructions

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 essential to help us perform our duties and to determine courses of action so please answer fully and accurately. The form is completed online using Survey Monkey. 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. The questions on this survey apply to the 2023 calendar year. Please complete the End-of-Year Chapter Summary in a timely manner—on or before January 15, 2024—at which time the survey will expire.

IMPORTANT: We strongly recommend that you research the responses to these questions, complete the answers off-line on this form, and then between January 1 and January 15th load your responses into the online survey at one sitting. We had complaints last year that if the survey was only partially completed, that you had to start over when you went back in to finish it. This, unfortunately, is a function of that program and that is why we recommend you write down your answers before you do the online survey. Note also that the questions online may look slightly different, but that won't affect your responses. This survey will not be posted online until mid to late December. Watch the Weekly Leadership Updates and Weekly Web Watch for the link.

Definitions:

Member—the primary individual listed in the ACBS member directory who is current on their dues

Co-member—the secondary individual listed in the ACBS member directory. A spouse who is NOT listed as a co-member in the ACBS directory does not count for the purpose of these questions.

Primary member—a member current on ACBS dues that considers your chapter “home.” This individual probably maintains a primary residence in your chapter’s geographic area.

Not primary member—a member current on ACBS dues that considers your chapter a “secondary” chapter. This individual might maintain a secondary residence in your chapter’s geographic area or may just have some personal interest in your chapter.

Balance—an accurate amount in whole dollars obtained from a bank, broker or investment report.

1. What is the name of your chapter?

Provide the full name of your chapter as listed on this page: <https://myacbs.org/Chapter>

2. Check the ACBS Chapter webpage <https://myacbs.org/Chapter> . Click on the name of your chapter. Scroll down to the “Chapter Officers” section. Is the information listed on all the chapter officers still correct?
 - a. Yes
 - b. No--Please list deletions and additions (include name, cell number, and email address).

You need database administrative privileges to be able to access this page. This is self-explanatory.

3. What is your chapter’s Employment Identification Number (EIN) or State Tax ID number or tax number assigned by a foreign country?

Your Treasurer probably has this. Make sure that this is the number you used to set up your bank

and investment accounts. If not, you need to correct that.

4. What is your chapter's legal status? Mark one of the following:
- a. Unincorporated Nonprofit Association (Constitution + Bylaws)

Most chapters will fall in this category.

- b. Incorporated Nonprofit (Articles of Incorporation + Bylaws)--In what state or province:

If you are not sure if your chapter is incorporated in a state or province, generally you can look up your chapter's legal name on the Secretary of State's website (or comparable site in a foreign country).

5. Mark one of the following:
- a. Our chapter has no IRS designation as a nonprofit
 - b. Our chapter is recognized by the IRS as a 501(c)(3) nonprofit-- date of last 990 filed:

 - c. Our chapter is recognized by the IRS as a 501(c)(7) nonprofit-- date of last 990 filed:

The IRS has a webpage where you can look up using your chapter's legal name or EIN to check your status and to see what dates they have listed for the last filing dates of your 990 form (click on your chapter's name). <https://apps.irs.gov/app/eos/>

6. Number of chapter members current on dues (total membership):
- a. On 1/1/23 _____
 - b. On 12/31/23 _____

Hopefully you saved your monthly total membership Excel report.

7. On 12/31/23, how many members current on their dues were primary chapter members?

If you access your chapter information on the ACBS portal, you can just pull that number off the report.

8. On 12/31/23, how many members current on their dues were NOT primary chapter members?

If you access your chapter information on the ACBS portal, you can just pull that number off the report.

9. How many members and listed co-members did your chapter have on 12/31/23? _____

You will need to do a sort on your 12/31/23 total membership Excel report to obtain this information.

10. Board positions (Officers + Directors) on 12/31/23
- a. Number of filled Board positions _____
 - b. Number of unfilled Board positions _____

Self explanatory.

11. Estimate the number of members (not including co-members) who participated in over half of the chapter events and meetings that you held in 2023. _____

This year we are trying to be more consistent in assessing chapter participation. We recommend that during the year you track member attendance at events and meetings sponsored by your chapter.

12. Estimate the number of co-members who participated in over half of the chapter events and meetings that you held in 2023. _____

This year we are trying to be more consistent in assessing chapter participation. We recommend that during the year you track co-member attendance at events and meetings sponsored by your chapter.

13. Does your chapter have any members who are members of the chapter but not members of ACBS?
- a. Yes—Number of members that only pay dues to the chapter: _____
 - b. No

ACBS has concerns regarding this practice. Please answer this question honestly.

14. Chapter Checking Account balance:
- a. On 1/1/23 _____
 - b. On 12/31/23 _____

Record an accurate amount in whole dollars obtained from a bank or credit union statement.

15. Chapter Savings Account balance:
- a. None
 - b. Balance on 1/1/23 _____
 - c. Balance on 12/31/23 _____

Record an accurate amount in whole dollars obtained from the bank or credit union report.

16. Investments or other funds
- a. None
 - b. Endowment balance on 12/31/23 _____
 - c. Investment balance on 12/31/23 _____

Record an accurate amount in whole dollars obtained from a bank, broker or investment report.

17. Does your chapter pay rent or hold a lease on space, buildings or land?
- No
 - Yes--Please provide details (e.g., parties, price, description)

ACBS would like to know the prevalence of this practice.

18. Does your chapter own any buildings, land, vessels or equipment (including tools)?
- No
 - Yes--Please explain this investment fully.

ACBS would like to know the prevalence of this practice.

19. Did your chapter make any donations of cash to any group or individual outside of ACBS?
- No
 - Yes --Please provide name of organization(s) and amounts.

ACBS would like to know what organizations the chapters are supporting.

20. Review the 2022 EOY Survey and the report provided by the CDC. Did your chapter take any action on recommendations made? Mark one:
- No recommendations made.
 - Our chapter did not address recommendations made.
 - Our chapter addressed the recommendations made. Please provide details.

2022 was the first year ACBS conducted a detailed analysis of the Chapter EOY reports. The CDC made a concerted effort to give each chapter feedback and to make suggestions when warranted. We'd like to know if your chapter followed up on any recommendations.

21. Is your chapter currently experiencing any problems?
- No
 - Yes. Please provide details.

ACBS can't help if we don't know what issues the chapters are facing.

22. What suggestions do you have for ACBS?

ACBS is always looking for good ideas and for suggestions for needed change. Please share.

23. Any other comments you'd like to make?

This is your opportunity to speak your mind.

24. If ACBS Headquarters needs a quick response from your chapter, who is the best person to contact? Provide name, cell number and email address.

25. Name and position of person completing this report.

In a separate email, please send the following to headquarters:

- A copy of your chapter Bylaws if any changes were made in 2023.

2. A copy of your Articles of Incorporation if your chapter incorporated in a state or province in 2023.
3. A copy of your IRS designation nonprofit letter if you have not already provided that.
4. If you have an IRS designation, a copy of your most recent 990 (this is public information).