2017 Council Annual Report

Due January 31, 2018

Why must Councils report on Council programs, activities, and finances?

- Our national leaders frequently make public appearances and members of the media and Congress often request this information;
- Financial information is required to accurately portray our tax-exempt status;
- The accuracy of your responses will ensure we maintain a high standard of public service and will encourage public support of our efforts;
- Media releases are sent from National Headquarters and must tell the correct Navy League story about what members are doing in their communities;
- Submission of an Annual Report is one of the requirements for a Council to receive semi-annual rebates;
- Council Awards are based in part on timely submission and content:
    - It is acceptable to add additional pages or other documentation to demonstrate the Council's fulfillment of the requirements for awards.
    - A separate scrapbook may also be submitted by January 31st, but is not required.
- Only your Council's President, Treasurer, Executive Director, Contact Contact, and Membership Chair will have access to Council's rosters and reports via the Navy League Portal.

When you have completed the report, please submit via email to

annualreport@navyleague.org

With a copy to your Council's

Region President
Area President

Notice

Failure of a Council President to submit this report will result in forfeiture of Council dues rebates. For those Councils that participate in the group exemption, delayed submission may also endanger the Council's Section 501(c)(3) federal income tax exemption, coverage under the Group Insurance policy, and exemption from any state sales/use taxes. This report is submitted in accordance with the National Bylaws of the Navy League of the United States, the National Policies adopted by the National Board of Directors and in satisfaction of the Council's obligation of compliance therewith.

Important

Council activity and financial information is for the previous calendar year. Council officer information is for the current calendar term (i.e. Your 2017 Annual Report will list 2017 activities and financial data and your 2018 Council incoming officers).

Due January 31, 2018

Council Name _____ Constituent ID _____
Region Name _____
Area Name _____ Charter Date _____
Form Completed by _____ Date _____

Permanent Council Address and Communication Information

Certain information has been pre-populated from our records. Please review this information for accuracy.
If the information is ***incorrect***, please provide corrected information in the **Updated Council Information** fields below.

Council Address Line 1 _____
Council Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ Is this number ☐ Cell ☐ Home ☐ Business Fax _____
Council Email _____
Council Website URL _____

Updated Council Information **Complete the fields below ONLY if you are requesting your record be updated.**

Council Address Line 1 _____
Council Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ Is this number ☐ Cell ☐ Home ☐ Business Fax _____
Council Email _____
Council Website URL _____
Blog URL _____
Facebook URL _____
Twitter Handle _____
Instagram Name _____
YouTube Name _____
Other (Flickr/Tumblr) _____

All Navy League officers must have a current address, phone number and email address on file.
All council officer contact information may be updated online through the Portal.

2017 Reporting Officers

Council President Name _____ Member No. _____
CP Address Line 1 _____
CP Address Line 2 _____
CP City _____ CP State _____ CP Country _____ CP Zip/Postal Code _____
CP Phone _____ This number is a ☐ Cell ☐ Home ☐ Business CP Fax _____
CP Email _____

Council Contact Name _____ CP Member No. _____
CC Address Line 1 _____
CC Address Line 2 _____
CC City _____ CC State _____ CC Country _____ CC Zip/Postal Code _____
CC Phone _____ This number is a ☐ Cell ☐ Home ☐ Business CC Fax _____
CC Email _____

2018 Incoming Officers and Committee Chairs

Please do not change officer titles. Additional officers are not required to be reported. All names and contact information must be entered. Entering "*Same*" is not an acceptable submission.

Month Council Officer Elections held _____ Date New Officers Take Office [MM / DD/ YYYY] _____

All Navy League officers must have a current address, phone number and email address on file.
All council officer contact information may be updated online through the Portal.

President _____ Member No. _____
Address Line 1 _____
Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ This number is a ☐ Cell ☐ Home ☐ Business Fax _____
Email _____

Vice President _____ Member No. _____
Address Line 1 _____
Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ This number is a ☐ Cell ☐ Home ☐ Business Fax _____
Email _____

Treasurer _____ Member No. _____
Address Line 1 _____
Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ This number is a ☐ Cell ☐ Home ☐ Business Fax _____
Email _____

Secretary _____ Member No. _____
Address Line 1 _____
Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ This number is a ☐ Cell ☐ Home ☐ Business Fax _____
Email _____

Council Contact _____ Member No. _____
Address Line 1 _____
Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ This number is a ☐ Cell ☐ Home ☐ Business Fax _____
Email _____

Executive Director _____ Member No. _____
Address Line 1 _____
Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ This number is a ☐ Cell ☐ Home ☐ Business Fax _____
Email _____

Membership _____ Member No. _____
Address Line 1 _____
Address Line 2 _____
City _____ State _____ Country _____ Zip/Postal Code _____
Phone _____ This number is a ☐ Cell ☐ Home ☐ Business Fax _____
Email _____

Council Financial and Giving Information

Council's Tax Exempt Status

1. Federal Tax ID or Employer Identification Number (EIN): _____

2. How is your Council legally organized? ☐ Unincorporated ☐ Corporation ☐ Other (describe below)

3. What is the status of your Council's tax exemption? ☐ Group ☐ Individual ☐ None

   Date of IRS tax determination letter (if individual exemption) [MM / DD/ YYYY] _____

4. Is the Council up to date in its IRS and State filings? ☐ Yes ☐ No

   If *Yes*: Which Form 990 was filed? _____

   Submit copy of last filing with Annual Report Submission as a separate attachment.
   Failure to file the appropriate forms with STATE and LOCAL regulator may also jeopardize the Council's tax-exempt status.

5. Has the Council filed all necessary state and local and charitable registration forms? ☐ Yes ☐ No
   Failure to file the appropriate forms with STATE and LOCAL regulator may also jeopardize the Council's tax-exempt status.

6. Date of Last Financial Audit [MM / DD/ YYYY] _____

7. Total council assets (cash and investments) as of December 31 $ _____

8. Did the Council employ a paid Executive Director or Administrator as of December 31? ☐ Yes ☐ No

Important Note

Councils are *not automatically* part of the Group Tax Exemption Program. Information on how to apply may be found in the Operations Manual.

All members of the Group Tax Exemption Program must immediately notify Headquarters of any change in the PO Box, or any other information that may affect their tax-exempt status.

Headquarters Contact: Gerald Saunders, Director, Field Services, Training and Awards
Email: gsaunders@navyleague.org
Phone: 703-312-1573

Summary of Major Council Activities

This section is a snapshot of your Council's activities throughout the past year.

Council Operations

12.

	Yes	No	How many meetings were held?
Did your Council hold Directors meetings?			
Did your Council hold General Membership Meetings?			

13.

	Yes	No	How many became members?	How many did not become members?
Did your Council actively recruit Community Affiliate Members?				
Did your Council actively recruit Corporate Members?				

Advocacy and Legislative Outreach

14.

	Yes	No	How many meetings were held?
Did your Council participate in the legislative grass roots program?			
Did your Council give a presentation to Members of Congress or their staffers?			
Did your Council send letters to Congress on Navy league issues?			
Did your Council invite a Representative to speak at Council event?			
Did your Council give recognition to a Member of Congress?			
Did your Council distribute Legislative Updates to Council members?			

Advocacy and Legislative Outreach - Activities

15. List all Congressional and any other Advocacy and Legislative Outreach activities. See example.

	Date of Event	Event Name	Activity or Purpose Description
Ex:	*06/15/2017*	*Visit to Rep. Juan Vargas (D-CA51)*	*Sea Services Budget*

16. Did your Council support State/Local legislative sea services Initiatives (encroachment, land use)?

	Date of Event	Event Name	Activity or Purpose Description
Ex:	*08/09/2017*	*Meeting with Imperial County Planning Department*	*Airspace Encroachment*

Council Fundraising Events

17. List each fundraising activity by Date, Event Name, Description, and Net Profit.

	Date of Event	Event Name	Activity or Purpose Description	Estimated Event Attendance	Event Goals Met? (Y/N)	Net Profit (rounded to nearest dollar)

Youth Programs – Support

18. Did the Council support Youth Programs? ☐ Yes ☐ No

If yes, list which type of youth group, using the youth group abbreviation, and unit name that was supported. Complete each statement for each group (i.e. number of scholarships, number of awards given, and funding amounts, etc.). *See example*.

	List Group Using Abbreviation: USNSCC USNLCC NJROTC MCJROTC YM, or OTHER	Unit Name	Is this a New Adoption? (Y or N)	Total Number of Scholarships Awarded	Total Amount of Scholarships Awarded	# of Awards given	Total Amount of Annual Support (excluding scholarships)	Did you provide Seapower magazine to this group? (Y or N)
Ex:	*USNSCC*	*Desert Eagle Squadron*	*N*	*1*	*$500*	*4*	*$2500*	*Y*

Youth Programs – Activities (except STEM)

19. Did the Council support Youth Programs with activities? *(Do not include STEM activities)* ☐ Yes ☐ No

If yes, list which type of youth group using the youth group abbreviation, and the unit name that was supported. Complete the statement for each activity (i.e. award ceremony, parade float, fundraising dinner, etc.). *See example*.

	List Group Using Abbreviation: USNSCC USNLCC NJROTC MCJROTC YM, or OTHER	Unit Name	Date of Event	Activity, or Event Name and Description	Was this a Council Event? (Y/N)	Was the support provided with volunteers, financial support, or both?
Ex:	*USNSCC*	*Desert Eagle Squadron*	*06/15/2016*	*Awards Ceremony*	*Y*	*Both*

Youth Programs – STEM

20. Did the Council participate in any Science, Technology, Engineering or Math (STEM) activities? ☐ Yes ☐ No

If yes, list which type of youth group using the youth group abbreviation, and the unit name that was supported in STEM activities. Complete the statement for each activity (i.e. judged competition, purchased SeaPerch kits, etc.). *See example*.

	List Group Using Abbreviation: USNSCC USNLCC NJROTC MCNROTC YM, or OTHER	Unit Name	Date of Event	School-based Event (Y or N)	Activity Name/Description
Ex:	*USNSCC*	*Desert Eagle Squadron*	*06/15/2016*	*Y*	*Judged 2016 STEM Video Game Challenge, Calipatria High School, Calipatria, CA*

Sea Services Support – Adoptions and Continuing Support

21. Did your Council adopt or continue the support of a ship, command, squadron or unit this year? ☐ Yes ☐ No

If yes, using the group abbreviation, list which sea service was adopted, or continued to receive support? Complete the statement for each. *See example*.

	List Service Using Abbreviation: USN, USMC, USCG, USNS or OTHER	Ship, Command, Squadron or Unit Name	Adopted or Released	Date of Event	Adopted, Continuing Support, Decommissioned Do not list activities in this section.
Ex:	*USN*	*USS RAFAEL PERALTA (DDG 115)*	*Adopted*	*08/01/2017*	*Adoption Ceremony*

Sea Services Support – Awards

22. Did the Council provide sea service awards to active duty members or their families? ☐ Yes ☐ No

If yes, using the group abbreviation, list which Sea Service was supported, and the total number of awards given, and funding amounts for each event. Indicate whether the award was given for an Active Duty (AD) or Family (F) member. *See example*.

	List Service Using Abbreviation: USN, USMC, USCG, USNS or OTHER	Ship, Command, Squadron or Unit Name	Award Name	Date of Event	Activity or Event Description	AD	F	Total Number Awards Given	Total Amount of Award(s) Given
Ex:	*USN*	*USS RAFAEL PERALTA (DDG 115)*	*Sailor of the Quarter*	*09/15/2017*	*Monthly Lunch Meeting*	*6*	*2*	*8*	*$300*
Ex:	*OTHER*	*All Services Spouse of the Year*	*Spouse of the Year*	*12/11/2017*	*Spouse of the Year Luncheon*	*0*	*3*	*3*	*$1500*

Sea Services Support – Commissioning/Decommissioning Events

23. Did your Council raise funds for a commissioning or decommissioning of a ship, command, or unit this year? ☐ Yes ☐ No

If yes, using the group abbreviation, list which Sea Service was supported, and unit name that was supported. Complete the statement for each unit and event. *See example*.

	List Service Using Abbreviation: USN, USMC, USCG, USNS or OTHER	Ship, Command, Squadron or Unit Name	Date of Event	Commission or Decommission	Activity or Event Description	Total Amount of Funds Raised
Ex:	*USN*	*USS RAFAEL PERALTA (DDG 115)*	*06/15/2016*	*P-Commissioning*	*Commissioning Solicitations*	*$55000*

Sea Services Support – Events

24. Did the Council hold sea service-related events such as Homecomings, Fleet Weeks, Airshows, or Balls? ☐ Yes ☐ No
(Do not include commissionings/decommissiongs, or award-related events.)

If yes, using the group abbreviation, list which sea service was supported, and the event name. Complete the statement for each event. *See example*.

List Service Using Abbreviation: USN, USMC, USCG, USNS or OTHER	Ship, Command, Squadron or Unit Name	Date of Event	Event Type	Support Type	Total Financial Support Given
Ex: USMC	*VMA-214*	*10/10/2016*	*Birthday Ball*	*Financial Sponsorship*	*$1500*

Sea Services Support – Family

25. Did the Council provide support to local active duty military families? ☐ Yes ☐ No

(Do not include scholarships or other awards given.)

If yes, using the group abbreviation, list which sea service was supported, and the type of support given (financial career, morale), and related funding amounts if applicable for each event. *See example*.

List Service Using Abbreviation: USN, USMC, USCG, USNS or OTHER	Ship, Command, Squadron or Unit Name	Date of Event	Event Name	Support Type	Total Financial Support Given
Ex: USN	*NAF El Centro*	*11/18/2017*	*Joint Operation Give Thanks*	*Donated 175 Thanksgiving turkeys to active duty families*	*$3100*

Sea Services Support – Scholarships

26. Did the Council provide sea service Scholarships to active duty members or their families? ☐ Yes ☐ No

If yes, using the group abbreviation, list which sea service was supported, and the total number of scholarships given, and funding amounts for each. Indicate whether the scholarship was given for an Active Duty (AD) or Family (F) member. *See example*.

	List Service Using Abbreviation: USN, USMC, USCG, USNS or OTHER	Ship, Command, Squadron or Unit Name	Award Name	Date of Event	Activity or Event Description	AD	F	Total Number Awards Given	Total Amount of Award(s) Given
Ex:	*USN*	*NAF El Centro*	*Wheeler Scholarship*	*06/15/2016*	*Monthly Dinner Meeting*	*6*	*2*	*8*	*$2000*

Public Education Activities

27. Did the Council hold joint meetings with local civic groups or Veteran organizations? ☐ Yes ☐ No

If yes, list date, event name, date, type of activity, estimated event attendance and total volunteer hours associated with each event.

Date of Event	Civic Group / Veteran Organization Name	Event Name	Event Description	Estimated Event Attendance
Ex: 05/29/2017	*VFW; Elks Lodge #325*	*Memorial Day Services*	*Joint Memorial Services, Evergreen Cemetery, El Centro, CA*	*150*

Need additional space?

Please elaborate on any numbered "Yes" answers provided. If you need more space, please continue and attach the information on separate sheets. It is required that you notate the Section heading (i.e. "Sea Services Support – Events) and related information on the attachment for which additional information is being provided.

Instructions for Filing

This report must be submitted by Email. Reports are considered filed on the date sent.

We recommend you keep a hard copy print edition for your records, and an electronic copy in your archives.

Please Email one copy each to:

- Member Services: annualreport@navyleague.org
- Your Council's Region President
- Your Council's Area President