



NAVY LEAGUE OF THE UNITED STATES

2016 Council Annual Report

(Revised 01/17)

DUE March 17, 2017

Questions? Contact annualreport@navyleague.org

**Navy League of the United States
COUNCIL ANNUAL REPORT**

DUE March 17, 2017

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

- Submission of an Annual Report is a requirement for Councils to receive semi-annual rebates.
- Financial information is required to accurately portray our tax-exempt status.
- Council Awards are based in part on a 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.
 - Photos or any additional supporting documents are greatly appreciated and will enhance your council's story; however, it is **not** required.
- The accuracy of your responses will ensure we maintain a high standard of public service and will encourage public support of our programs.
- Accurate reporting assists in tell the correct Navy League story about what members are doing in their communities.

When you have completed the report, please submit via e-mail to: annualreport@navyleague.org

In the subject line of your email, please write: "Council Name" Annual Report Submission. With 220+ councils, this will help us quickly identify your specific annual report should you have follow up queries about the information submitted. We thank you in advance for your assistance with this request.

E-mail a copy to your council's: [Region President and Area President](#)

We recommend you keep a copy of this report for your council's records.

Notice and Reporting Time Period

Failure to submit this report will result in forfeiture of Council dues rebates for the 2017 calendar year. 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.

Council activity and financial information is for the *previous* calendar year. **Council officer information is for the current calendar year.** The 2016 Annual Report will list 2016 activities and financial data and your 2017 Council incoming officers.





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COUNCIL ANNUAL REPORT FOR 2016**

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(Revised 1/17)

DUE March 17, 2017

Council: _____
Region: _____ Area: _____
Charter Date: _____
Form Completed by: _____ Date Form Completed: _____

PERMANENT COUNCIL ADDRESS AND COMMUNICATION INFORMATION

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



COUNCIL ANNUAL REPORT - 2016 REPORTING OFFICERS

President: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business

Treasurer/Other: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business

2017 INCOMING OFFICERS and COMMITTEE CHAIRS

Month Council Officer Elections Held: _____ **Date New Officers Take Office:** _____

President: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business



Treasurer: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business

Council Contact: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business

Membership: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business

Legislative Affairs: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business



Other: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business

Other: _____ Member #: _____
Address Line 1: _____
Address Line 2: _____
City: _____ State: _____ Country: _____ Zip/Postal Code: _____
Email: _____
Phone 1: _____ Home Cell Business
Phone 2: _____ Home Cell Business



2016 COUNCIL FINANCIAL AND GIVING INFORMATION

Council's Tax Exempt Status

1. How is your Council legally organized? Unincorporated Corporation Other (describe below)
Other: _____
2. What is the status of your Council's tax exemption? Group Individual None
Date of IRS tax determination letter (if individual exemption): _____
3. Federal Tax ID or Employer Identification Number (EIN): _____
4. Has the Council filed all necessary state and local 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.
5. Is the Council up to date in its IRS and State filings? Yes No
If **yes**, please submit a copy of your last filing. If **no**, what was the last date filed? _____
6. Date of last financial audit: _____
7. Total Council assets (cash and investments) as of December 31, 2016: \$ _____
8. Did the Council employ a paid Executive Director or Administrator as of December 31, 2016? Yes No

IMPORTANT NOTE: All members of the Group Tax Exemption Program must email Ryan Donaldson (groupexemption@navyleague.org) of any change that may affect their tax-exempt status. Please note Councils **are not automatically** part of the Group Tax Exemption Program. Information on how to apply may be found in the Operations Manual.

Council Rebate Information

Complete this section only if you have not reported this information to the Finance Controller at Headquarters. If you prefer to all in with this information, please contact the Finance Controller at: 800-365-5760. International Councils do NOT need to submit this information.

1. Account Name (exactly as it appears on Council Financials): _____
2. Institution Name: _____
3. Routing Number: _____ Account Number: _____
Type of Account: Checking Savings

SUMMARY OF MAJOR COUNCIL ACTIVITIES FOR THE PAST YEAR (2016)

This section is a snapshot of your Council's activities last year. ***If you need more space*** for any of the questions, please continue and attach the information on separate sheets. Please notate the Section heading (i.e. "Sea Services-Related Events/Support) and related information on the attachment for which additional information is being provided.

Council Operations

1. Did your Council hold Directors meetings? Yes No **If Yes:** How many? _____
2. Did your Council hold General Membership meetings? Yes No **If Yes:** How many? _____
3. Did your Council actively recruit Community Affiliate members? Yes No **If Yes:** How many? _____

Council Fundraising Events

List all council fundraising events, purpose and net profit for each event. If your council supports more activities, please provide a separate listing.

Event Name: _____ Date: _____
Activity: _____ Net Profit: _____

Event Name: _____ Date: _____
Activity: _____ Net Profit: _____

Event Name: _____ Date: _____
Activity: _____ Net Profit: _____

Event Name: _____ Date: _____
Activity: _____ Net Profit: _____

Event Name: _____ Date: _____
Activity: _____ Net Profit: _____



3. List all schools, libraries, units to whom your Council provides *SEAPOW*ER subscriptions and any other Youth Programs your Council supports:

Group Name _____
 Group Name _____
 Group Name _____

Science, Technology, Engineering, Math (STEM)

1. Does your council participate in any science, technology, engineering or math (STEM) activities?
 Yes (please describe activities below; if school-based program, indicate YES or NO)
 No (please answer # 2)

Activity Name: _____ Date: ___ / ___ / ___ School-based program? _____

Activity Name: _____ Date: ___ / ___ / ___ School-based program? _____

Activity Name: _____ Date: ___ / ___ / ___ School-based program? _____

2. *Is your council interested in starting a STEM program in 2017?*
 Yes No

3. Estimated annual expense for Council STEM Program(s). \$ _____

4. Do any of your council members mentor a Sea Cadet/NJROTC student/program?
 Yes No If **YES**, please describe the relationship?

5. Did you receive external funding source for STEM?
 Yes No If **YES**, from whom? _____ Amount of external funding: \$ _____



Sea Services-Related Events (i.e. Homecoming, Air show, Fleet Week, Birthday Ball, etc.)

Did your Council hold sea services-related events (NOT awards)? Yes No If **Yes**, How many? _____

If yes, please list all sea service events below. If your council supports more activities, please provide a separate listing.

Event Name: _____ Date: ____ / ____ / ____

Support Type: _____

Event Name: _____ Date: ____ / ____ / ____

Support Type: _____

Event Name: _____ Date: ____ / ____ / ____

Support Type: _____

Event Name: _____ Date: ____ / ____ / ____

Support Type: _____

Event Name: _____ Date: ____ / ____ / ____

Support Type: _____

Council Ship Commissioning and Adoption Activity

1. Was your Council involved in the commissioning or decommissioning of a ship/command/unit this year? Yes No

If **YES**, how many? _____

2. List all ships/command/units commissioning or decommissioning events and funds raised in support of the event(s).

Event Name: _____ Date: ____ / ____ / ____

Funds Raised: \$ _____ Commissioning? Decommissioning?

Event Name: _____ Date: ____ / ____ / ____

Funds Raised: \$ _____ Commissioning? Decommissioning?

Event Name: _____ Date: ____ / ____ / ____

Funds Raised: \$ _____ Commissioning? Decommissioning?

3. Did your Council adopt a ship/command/unit this year? Yes No If **YES**, how many? _____

Sea Services-Related Family Support

Did your Council provide support to local military families? Yes No

If Yes: List your Council's sea services family support activities (e.g. financial, career, morale). If your council supports more activities, please provide a separate listing.

Activity Name: _____ Date: ___ / ___ / ___
Support: _____

Activity Name: _____ Date: ___ / ___ / ___
Support: _____

Activity Name: _____ Date: ___ / ___ / ___
Support: _____

Activity Name: _____ Date: ___ / ___ / ___
Support: _____

Sea Service-Related Awards (i.e. Sailor or Spouse Awards and Scholarships – *not youth groups*)

List your Council's sea services awards or scholarships to service and/or family members, if applicable, If your council supports more activities, please provide a separate listing.

Award: _____ Date: ___ / ___ / ___

Award: _____ Date: ___ / ___ / ___

Award: _____ Date: ___ / ___ / ___

Award: _____ Date: ___ / ___ / ___

Award: _____ Date: ___ / ___ / ___



4. List all ships/commands/units adopted or supported in 2016.

Ship/Unit/Command Name: _____ Date: ____ / ____ / ____

Event/Support Type: _____ Supported? Adopted?

Ship/Unit/Command Name: _____ Date: ____ / ____ / ____

Event/Support Type: _____ Supported? Adopted?

Ship/Unit/Command Name: _____ Date: ____ / ____ / ____

Event/Support Type: _____ Supported? Adopted?

Public Education Activities

1. Did your council hold joint meetings with local civic groups or veteran organizations? (i.e. Rotary, VFW, etc.) Yes No

2. List all joint meetings with other civic groups or veteran service organizations:

Event Name: _____

Organization: _____

Date: _____

Attendance: _____

Event Name: _____

Organization: _____

Date: _____

Attendance: _____

Event Name: _____

Organization: _____

Date: _____

Attendance: _____

Event Name: _____

Organization: _____

Date: _____

Attendance: _____

Event Name: _____

Organization: _____

Date: _____

Attendance: _____



3. Did your Council make presentations to local schools? Yes No If YES, how many? _____

Event Name: _____
Organization: _____

Date: _____
Attendance: _____

Event Name: _____
Organization: _____

Date: _____
Attendance: _____

Event Name: _____
Organization: _____

Date: _____
Attendance: _____

Event Name: _____
Organization: _____

Date: _____
Attendance: _____

4. Did your Council conduct sea services seminars/panel discussions?

With industry partners? Yes No If YES, how many? _____

With other civic organizations? Yes No If YES, how many? _____

At a local college or university? Yes No If YES, how many? _____

5. List seminar / panel discussions:

Event Name: _____
Attendance: _____

Date: _____

Event Name: _____
Attendance: _____

Date: _____

Event Name: _____
Attendance: _____

Date: _____

Event Name: _____
Attendance: _____

Date: _____

6. Did your Council submit op-eds or letters to the editor in local publications? Yes No

If YES, how many? _____

Please submit any copies that were published with annual report submission.



7. Did your Council display a Navy League information or membership booth at any public education activities? Yes No
If **YES**, how many? _____

Event Name: _____ Date: _____
Activity: _____ Attendance: _____

Event Name: _____ Date: _____
Activity: _____ Attendance: _____

Event Name: _____ Date: _____
Activity: _____ Attendance: _____

Event Name: _____ Date: _____
Activity: _____ Attendance: _____

8. Did your Council publish a newsletter? Yes No If **YES**, what is the frequency (monthly, quarterly, etc.)? _____

a. Newsletter name: _____

b. In what format is the newsletter published? Electronic Print Both

c. In what format in the newsletter created (e.g. Mail Chimp, Constant Contact, Luminare, etc.)? _____

9. Did your Council have an active Speaker's Bureau? Yes No If **YES**, how many? _____

10. Did your Council have any other public education activities? Yes No If **YES**, how many? _____

Event Name: _____ Date: _____
Activity: _____ Attendance: _____

Event Name: _____ Date: _____
Activity: _____ Attendance: _____

Event Name: _____ Date: _____
Activity: _____ Attendance: _____



Advocacy and Legislative Outreach

- 1. Did your Council participate in legislative grass roots program(s)? Yes No **If Yes:** How many? _____
- 2. Did a Council member(s) give a presentation to Member(s) of Congress or their staffers? Yes No **If Yes:** How many? _____
- 3. Did your Council send letters to Congress on Navy league issues? Yes No **If Yes:** How many? _____
- 4. Did your Council invite a Representative to speak at Council event? Yes No **If Yes:** How many? _____
- 5. Did your Council give recognition to a Member of Congress? Yes No **If Yes:** How many? _____
- 6. Did your Council distribute Legislative Updates to Council members? Yes No **If Yes:** How many? _____
- 7. Other activities (advocacy or Legislative Outreach, e.g. Navy League presentations):
Yes No **If Yes:** How many? _____

List all Congressional and any other Advocacy and Legislative Outreach activities:

Event Name _____
Activity _____ Date ____ / ____ / ____

Event Name _____
Activity _____ Date ____ / ____ / ____

Event Name _____
Activity _____ Date ____ / ____ / ____

Event Name _____
Activity _____ Date ____ / ____ / ____

Event Name _____
Activity _____ Date ____ / ____ / ____

