



Year at a Glance for Chapter Presidents **2019/2020 Checklist and Deadlines**

The Year at a Glance has been aligned with the 5 Star Healthy Chapter Program to support our Chapters in their focus, preparation and planning.

- ❖ **Star One** – Creating Your Chapter One Page Business Plan
- ❖ **Star Two** – Membership & Retention
- ❖ **Star Three** – Increasing Attendance at Programs & Events
- ❖ **Star Four** – Fiscal Responsibility
- ❖ **Star Five** - Advocacy

June

- Update Board roster(Star 4)
- Schedule Board retreat (Star 4)
- Read Chapter Bylaws (Star 4)
- Read Chapter Policy and Procedures (Star 4)
- Read NAWBO Mission and Vision Statement (Star 4)
- Read NAWBO Creed (Star 4)
- Calendar Monthly Connect Calls - 3rd Thursday of every month at 12pm ET (Star 4)
 - An email will be sent to you in July to provide the Zoom link and which chapter size call you be participating in
- Meet with immediate Past President to see what role or projects she can help with for the chapter (Star 4)
- Meet with the Executive Director or administrative support - the ED will help with Board meeting logistics and preparation (Star 4)
- Familiarize yourself with Robert's Rules of Order (Star 4)
- Install new Board (Star 4)
- Attend Advocacy Day - June 2, 2020 (Star 5)

July

- **Promote Annual Conference - early bird discount ends July 31st (Star 2)**
- **Star 5 deadline to be recognized at the Annual Conference - July 15, 2019 (Star 5)**
- **OPBP updates to begin, use (nawbo20) to log in as of July 16, 2019 (Star 1)**
- Calendar upcoming events, Board meetings, national conferences, and regional retreats (Star 4)
- Read the information on how to plan a strategic planning retreat and the strategic planning process in the Chapter Resource Center (Star 1)
- Appoint committee chairs (Star 4)
- Be sure you understand all local and national processes and how to use them to achieve results
*For example - How to access the Chapter Resource Center and when the PASC calls are held (Star 4)
- Make sure ALL your local meetings and the national meetings are on your calendar (Star 4)
- Submit the names of your local Board to the local newspaper (Star 4)
- Order new business cards for the Board members (Star 4)



- **Submit information by July 31st for D&O insurance to continue liability coverage for Directors and Officers (Star 4)**
- Review and update in time for your Strategic Retreat:
 - Actual financial results to budget for 4th Quarter and YTD (Star 4)
 - One Page Business Plan by July 15 (Star 4)
 - Close out books for fiscal year 2018-19 (Star 4)
- Approve your Budget – ensure that the budget goals align with your focus/objectives per your OPBP (Star 4)
- If your state requires it, file an annual report with your Secretary of State (Star 4)
- Confirm your bylaws are up to date, that you are using the National template (since last set of changes recommended by National 2 years ago), that they have been adopted, and are in effect. (Star 4)

August

- Schedule hotel for WBC - Annual Conference (Star 2)
- Promote Virtual Connect and Learns to supplement educational programs for the year - Virtual Connect and Learn calls are the 2nd Thursday of every month at 5pm ET (Star 3)
- Finalize calendar of events for the year – use the education themes to help with programming (Star 3)
- **Submit 990 to the IRS(due 4.5 months after Year-End); send copy of submitted form to NAWBO headquarters (Star 4)**
- **August 15th deadline for D&O insurance (Star 4)**

September

- Promote Leadership Development Training - February 6th- Albuquerque, New Mexico (Star 2)
- September 1 - applications open for National Board (Star 2)

October

- Attend Annual Membership Meeting (Oct. 13) - chapters will be recognized for excellence (Star 2)
- Attend Annual Conference Oct.14-15 (Star 2)
- Review and update by October 31 – in time for your November Board Meeting):
 - Actual financial results to budget for 1st Quarter (Star 4)
 - One Page Business Plan (Star 4)
- Applications close for National Board - October 31st(Star 2)

November

- **After Nov. 15th your IRS 990 filing is considered late(unless an extension is filed) and you may incur a penalty (Star 4)**

December

- National is DARK for all programming – National office is closed December 25th and reopens January 2nd

January

- Schedule flights and hotel for LDT (Star 2)
- Receive toolkit for Spring Membership Drive that includes digital assets (Star 2)
- Review and update by January 31 – in time for your February Board Meeting):
 - Actual financial results to budget for 2nd Quarter (Star 4)
 - One Page Business Plan (Star 4)



February

- LDT - February 6th - Albuquerque, New Mexico (Star 2)
- Promote Advocacy Day - June 2nd in Washington, DC (Star 5)
- Appoint a nominating committee (Star 4)

March

- Spring Membership Drive runs through April 30 (Star 2)
- Send out call for nominations to full membership for local chapter Board (Star 2)
- Call for nominations to Presidents Assembly Steering Committee (PASC) – March 1st (All Stars)

April

- Spring Membership Drive ends April 30 (Star 2)
- Announce the slate for the 2020-21 Board to the membership (Star 4)
- See separate checklist for the complete nomination process (Star 4)
- Review and update by April 30 – in time for your May Board Meeting:
 - Actual financial results to budget for 3rd Quarter (Star 4)
 - One Page Business Plan (Star 4)

May

- Announce the Board for 2020-2021 (Star 4)
- Begin transition process for new leadership and working with President-Elect (Star 1 and Star 4)
- Start the draft of FY 2020-2021 Budget (Star 4)
- Promote annual conference - Austin, TX- September 21-23, 2020 (Star 2)

Monthly Reminders:

- **National News - 1st week of the month**
- **NAWBO ONE – 3rd Wednesday of every month**
 - **Submission deadline for NAWBO ONE - 1st Wednesday of every month to publications@nawbo.org**
- **National Member News – 3rd week of every month**
- **Virtual Programming - 4th week of the month**

Your Role – Build the Team and Communicate

- Set up a meeting with each member of your Board to hear their vision and get buy-in to the goals and plans set forth in your chapter's One Page Business Plan
- Have each Board member send you a letter with their vision for the chapter and how they will be participating in upholding the One Page Business Plan
- Have ALL Board members complete, review and sign a Conflict of Interest form
- Submit names of Board members to the national office
- Update your roster and designation of chapter leaders on the national website (How you categorize the roles determines which email notices each leader receives from national)
- Respond to voicemails received on the same day; emails within one working day
- Determine your role in reviewing and forwarding key communications and set up email groups
- Review the limits of email as a communication tool within your chapter culture



Your Role – Focus on Service

- Identify and meet with key customers, corporate partners, political affiliates, and community alliance partners
- Form a network of other chapter presidents to share best practices and give each other support