**Year at a Glance for Chapter Presidents**

**2020-2021 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 - (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 (Star 5)**
* **Beginning July 15, update chapter objectives and action plans within the OPBP (Star 1) NOTE: Use nawbo21 as the new company id for login purposes**
* 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 (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**

* Promote Virtual ongoing Virtual programming. Tuesday of every week Virtual Lunch and Learn at 12pm ET. Wednesday of every week Community Connect and Premier member benefit 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 Academy Training - We are working on confirming the venue (Star 2)
* September 1 - applications open for National Board (Star 2)
* Fall Membership Drive begins September 1- October 31 (Star 2)

**October**

* Attend Annual Membership Meeting (September 21) - chapters will be recognized for excellence (Star 2)
* Attend Annual Conference- Virtual Experience - September 21-23 (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 LA (Leadership Academy) (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**

* LA - February Will provide more details later (Star 2)
* Promote Advocacy Day – early June 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 (please make sure that** [**national@nawbo.org**](mailto:national@nawbo.org) **is on your safe sender list).**
* **NAWBO ONE – 3rd Wednesday of every month**
  + **Submission deadline for NAWBO ONE - 1st Wednesday of every month to** [**publications@nawbo.org**](mailto:publications@nawbo.org)
* **National Member News – 3rd week of every month**
* **Virtual Programming and Special Events - every Friday**

**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