

ANNUAL REMINDERS FOR CHAPTER LEADERS

RED TEXT = ITEMS REQUIRED BY IAEE CHAPTER BYLAWS
BLUE TEXT = IMPORTANT CHAPTER ACTION ITEM

DATE	ACTIVITY	COMPLETED ✓
January	Update your chapter webpage. Add new chapter leaders, full calendar of events, industry tips, etc.	
January 18	IAEE electronically deposits December financial payment and emails information to chapters.	
January 31	Catch up: If not already sent, chapter sends copies of 4th quarter 2015 chapter board meeting minutes to IAEE.	
	Chapter submits annual calendar of events/activities to IAEE. Chapters must submit their calendars by January 31 to be eligible to receive two \$1,000 speaker grants.	
	Chapters notify IAEE of meeting(s) they need IAEE leadership/staff to attend.	
	Chapters submit programming topic and speaker for months January – June 2016 by January 15th (July-December programming information is due May 15 of each year).	
	Chapters submit free educational topic (sponsored by FERN) by January 31.	
February 15	Chapter submits financial statements for July-December (previous year) to IAEE (statement should include Balance and Profit/Loss Statement).	
	IAEE sends January chapter reports to chapters.	
February 18	IAEE electronically deposits January financial payment and emails information to chapters.	
March 15	IAEE sends February chapter reports to chapters.	
March 18	IAEE electronically deposits February financial payment and emails information to chapters.	
March 31	Quarterly reminder: Chapter sends copies of chapter board minutes to IAEE.	
April	Update your chapter webpage.	
	IAEE Awards –nominations due 30 June. Place this on board meeting agenda for discussion as chapters have their own award, the MERIT Award. (You can submit a nomination from the chapter board.)	
April 1	Chapters obtain IRS Form 990-EZ. Chapters that have earned \$5,000+ in revenue during previous year must submit form by May 15. Form 1024 and 8718 will need to be submitted to qualify for tax exempt status. Submit by May 15.	
April 18	IAEE electronically deposits March financial payment and emails information to chapters.	
May 15	Chapters must postmark their IRS Form 990-EZ on or before this date.	
	Chapter submits educational programming topic and speaker for the remainder of the year (July-December) by May 15	

DATE	ACTIVITY	COMPLETED ✓
	IAEE sends April chapter reports to chapters.	
May 18	IAEE electronically deposits April financial payment and emails information to chapters.	
June 15	IAEE sends May chapter reports to chapters.	
June 18	IAEE electronically deposits May financial payment and emails information to chapters.	
June 30	Quarter reminder: Chapters sends copies of chapter board minutes to IAEE.	
July	Board agenda item: select individuals to represent your chapter at the Chapter Leaders Meeting at Expo! Expo! IAEE's Annual Meeting & Exhibition on December 6, 2016 (goal – all chapter leader volunteers attending Expo! Expo! should attend the Chapter Leaders Forum).	
	Update your chapter webpage.	
	Reminder: Chapters to schedule their Chapter Annual Meeting – to be held on or before November 30. Chapters' Nominating Committee - 60 days prior to Chapter Annual Meeting will need to circulate to their membership a Slate of officers for the next year.	
August	If you haven't submitted the information needed for the Chapter Assessment Tool paperwork, do so now as the chapter could receive up to three full Annual Meeting registrations.	
August 15	IAEE sends July chapter reports to chapter.	
	Chapters notify IAEE of chapter meeting room needs at Annual Meeting.	
August 18	IAEE electronically deposits July financial payment and emails information to chapters.	
August 31	Chapters submit January-July (current year) chapter financials to IAEE. (include Balance Sheet and Profit/Loss Statement)	
September 15	IAEE chapter reports sent to chapters.	
	Chapter Assessment Tool deadline – paperwork due to IAEE – final deadline if applying for complementary meeting registrations for Expo! Expo!	
September 18	IAEE electronically deposits August financial payment and emails information to Chapters.	
September 30	Quarterly reminder: Chapter sends copies of Chapter Board Minutes to IAEE.	
October	Update your chapter webpage.	
	IAEE sends September chapter reports.	
October 18	IAEE electronically deposits September financial payment and emails information to chapters.	
November 15	IAEE sends October chapter reports to chapters.	

DATE	ACTIVITY	COMPLETED ✓
	IAEE to alert chapters of member(s) who are an award winner or receiving CEM recognition at the Annual Meeting. Chapters can make arrangements for celebration at Annual Meeting Awards Luncheon.	
November 15	Chapter Board Slates are due. Chapters notify IAEE of incoming board and committee members.	
November 18	IAEE electronically deposits October financial payment and emails information to chapters.	
November 30	Chapter's Annual Meeting – to be held on or before November 30.	
November 30	All Jim Lynn Chapter Education Fund grant requests must be turned in. Each chapter may request two \$1000 speaker grants per year.	
December 6	Expo! Expo! IAEE's Annual Meeting & Exhibition (Chapter Leaders Forum).	
December	IAEE sends Press Release to chapters on Annual Meeting Award Luncheon winners.	
December 18	IAEE electronically deposits November financial payment and emails information to chapters.	
December 31	End of Year Reminder: Chapters sends copies of chapter board minutes to IAEE.	