# IAEE 4color logo HI RES**2018 ANNUAL REMINDERS**

# **FOR CHAPTER LEADERS**

### RED TEXT = ITEMS REQUIRED BY IAEE CHAPTER BYLAWS

**BLUE TEXT**= IMPORTANT CHAPTER ACTION ITEM

| **DATE** | **ACTIVITY** | **COMPLETED** MCWB01114_0000[1] |
| --- | --- | --- |
| January | Update your chapter webpage. Add new chapter leaders, full calendar of events, industry tips, etc. |  |
| January 15 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| 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 2017 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 2018 by January 15th (July-December programming information is due May 15 of each year).** |  |
| **February 15** | **Chapter submits financial statements for July-December (previous year) to IAEE**  (statement should include Balance and Profit/Loss Statement). |  |
| Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| February 18 | IAEE electronically deposits January financial payment and emails information to chapters. |  |
| March 15 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| 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 2 | **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 16 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| 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** |  |
| Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| May 18 | IAEE electronically deposits April financial payment and emails information to chapters. |  |
| June 15 | IAEE sends May chapter reports to chapters.  Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| June 18 | IAEE electronically deposits May financial payment and emails information to chapters. |  |
| **June 29** | 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 November 27, 2018 (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.** |  |
| July 16 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| 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 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| **Chapters notify IAEE of chapter reception meeting room needs at Annual Meeting.** |  |
| August 20 | 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 14** | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| **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 2** | Quarterly reminder: Chapter sends copies of Chapter Board Minutes to IAEE. |  |
| October | Update your chapter webpage. |  |
| October 15 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| October 18 | IAEE electronically deposits September financial payment and emails information to chapters. |  |
| November 15 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| 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 19 | 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 Chapter Education Fund grant requests must be turned in. Each chapter may request two $1000 speaker grants per year.** |  |
| **November 27** | **Expo! Expo! IAEE’s Annual Meeting & Exhibition (Chapter Leaders Forum).** |  |
| December | IAEE sends Press Release to chapters on Annual Meeting Award Luncheon winners. |  |
| December 14 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| 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.** |  |