2022 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 17	Access monthly chapter reports through IAEE's web portal (Elements) for chapter report updates	
January 19	IAEE electronically deposits December financial payment and emails information to chapters.	
February 1	**Catch up: If not already sent, chapter sends copies of 4th quarter 2021-chapter board meeting minutes to IAEE.**	
	Chapter submits annual calendar of events/activities, including educational programming, meet-up dates and board meeting dates to IAEE. **Chapters must submit their annual calendars by February 1 to be eligible to be to receive IAEE's Chapter Education Grant / Fund monies. Chapters may use this twice per year. If the speaker honorarium is for virtual it will be a payment of no more than $500 / Virtual and $1,000 in-person speaker grants. These payments are used to pay a speaker and not used for any other purposes.**	
	Chapters completes Speaker Request form for IAEE leadership to attend/speak during chapter meetings.	
	Chapters submit programming topic and speaker for months January – June 2022 February 1 (July-December programming information is due May 16 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.**	

DATE	ACTIVITY	COMPLETED ✔
April	Update your chapter webpage.	
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.** **Create Nominations Committee and begin the recruitment process for 2023 board of directors. Refer to your bylaws for guidance on who is the chair of the committee.**	
April 15	Access monthly chapter reports through IAEE's web portal (Elements) for chapter report updates	
April 19	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 16	
	Access monthly chapter reports through IAEE's web portal (Elements) for chapter report updates	
May 17	IAEE electronically deposits April financial payment and emails information to chapters.	
June 15	Access monthly chapter reports through IAEE's web portal (Elements) for chapter report updates	
June 17	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: share with your volunteers of the chapter that the Chapter Leaders Forum at Expo! Expo! IAEE's Annual Meeting & Exhibition on December13-15, 2022 (goal – all chapter leader volunteers attending Expo! Expo! should attend the Chapter Leaders Forum held on Monday, December 6).**	
	Update your chapter webpage.	
	Reminder: Chapters to schedule their Chapter Annual Meeting – to be held on or before November 15. **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 15	Access monthly chapter reports through IAEE's web portal (Elements) for chapter report updates	
July 19	IAEE electronically deposits June financial payment and emails information to chapters.	
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	**Chapter Leaders Retreat**	
August 15	Access monthly chapter reports through IAEE's web portal (Elements) for chapter report updates	

DATE	ACTIVITY	COMPLETED ✔
	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 13	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! **Register for IAEE's Chapter Leaders Forum during Expo! Expo! held on Monday, 12 December. Email Lisa Buchanan at lbuchanan@iaee.com**	
September 19	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.	
October 14	Access monthly chapter reports through IAEE's web portal (Elements) for chapter report updates. **Register for IAEE's Chapter Leaders Forum during Expo! Expo! held on Monday, 12 December. Email Lisa Buchanan at lbuchanan@iaee.com**	
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	
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 15	**Chapter's Annual Meeting – to be held on or before November 15.**	
November 30	**All IAEE Chapter Education Grant / Fund requests must be turned in. All protocol should be followed in order to receive monies.**	
December	IAEE sends Press Release to chapters on Annual Meeting Award Luncheon winners.	
December 13-15	IAEE 's Expo! Expo! Chapter Leaders Forum on December 6 and Expo! Expo! kicks off on December 13-15, 2022	
December 13	Access monthly chapter reports through IAEE's web portal (Elements) for chapter report updates	
December 19	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.**	