# IAEE 4color logo HI RES**2021 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. |  |
| **February 1** | **Catch up: If not already sent, chapter sends copies of 4th quarter 2020-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 2021 by January 15th (July-December programming information is due May 17 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 11 | National Meet-up Day for all Chapters. HQ will facilitate a virtual meet-up for YP’s, Chapters and join or if you want to do an in-person event you may do so. |  |
| 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. |  |
| 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.**  **Board agenda item: select individuals to represent your chapter at the Chapter Leaders Retreat August, 4-6 2021. We would like to have at least 1 or 2 representatives from each chapter. All chapters are expected to send at least one individual. IAEE will provide a $500.00 stipend to each chapter that sends representation.** |  |
| April 16 | 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 17** |  |
| 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 1-2 | Exhibitions Day – Chapters are encouraged to do something on the local level, post social media messaging and participate if they can. |  |
| June 2 | National Meet-up Day for all Chapters. HQ will facilitate a virtual meet-up for YP’s, Chapters and join or if you want to do an in-person event you may do so. |  |
| June 15 | 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 28** | 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 December7-9, 2021 (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 16 | 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 13 | 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 30** | Chapters submit January-July (current year) chapter financials to IAEE. (include Balance Sheet and Profit/Loss Statement) |  |
| **September 10** | 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, 6 December. Email Lisa Buchanan at** [**lbuchanan@iaee.com**](mailto:lbuchanan@iaee.com) |  |
| 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. |  |
| October 15 | 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, 7 December. Email Lisa Buchanan at** [**lbuchanan@iaee.com**](mailto: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 17 | National Meet-up Day for all Chapters – HQ will facilitate a virtual meet-up for YP’s, Chapters and join or if you want to do an in-person event you may do so. |  |
| November 19 | 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 6-9 | IAEE ’s Expo! Expo! Chapter Leaders Forum on December 6 and Expo! Expo! kicks off on December 7-9, 2020 |  |
| December 13 | Access monthly chapter reports through IAEE’s web portal (Elements) for chapter report updates |  |
| December 17 | 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.** |  |