

# Compliance Documents



- **Business Planning Documents - June 15, 2017.**
  - ✓ Business Plan
  - ✓ Budget
  - ✓ 18 month Education Calendar
  - ✓ Marketing Plan
  - ✓ Succession Plan
  - ✓ Current Bylaws
  - ✓ Current Policies
  - ✓ Board 101 & Conflict of Interest Confirmation
- **Monthly Dashboard – by 30<sup>th</sup>**
- **Chapter Admin Evaluation – by Aug 1**
- **Tax Returns – by October 1, 2017**
- **Year-End Financials – by October 1, 2017**
- **2018-2019 Board Slate – by March 1, 2018**



# 2017 Annual Performance Standards

- **Membership Satisfaction & Engagement of Services**
- **Leadership**
- **Administrative & Financial Practices**
- **Net Profit**
- **Communications**
- **Educational Offerings**

