# Chapter Annual Checklist

## Overview

The purpose of the chapter annual checklist is to provide an outline of ongoing chapter leader action items. This checklist is only a sample and chapter leaders should add additional action items specific to the chapter.

Questions? Contact HIMSS chapters staff or [chapters@himss.org](mailto:chapters@himss.org).

## Quick Links

* [Accountability Reporting](http://clra.himsschapter.org/Accountability-Reporting) and [Events & Initiatives Google Sheet](https://docs.google.com/spreadsheets/d/13ATf9JTfozaLXGO_SQi12EU1XvcNwBJsAoI2IBqCEU0/edit?usp=sharing)
* [Chapter request form](https://surveys.himss.org/Checkbox/Survey.aspx?s=99cad66d3a984d2cb71ed44c8e4efee4) (collaboration, speaker, financial support)
* [Marketing/branding material](https://storefront.classic-color.com/HIMSS-Chapters/)
* [Chapter Leader Resource Area](http://clra.himsschapter.org/)
* [HIMSS Engage](https://www.himssengage.org/chapters/pages/home.aspx)
* [Email portal](https://mail.himsschapter.org/index.php)

## Ongoing

* Ensure the [Events & Initiatives Google Doc](https://docs.google.com/spreadsheets/d/13ATf9JTfozaLXGO_SQi12EU1XvcNwBJsAoI2IBqCEU0/edit?usp=sharing) is current with all chapter activities
* Submit chapter board changes throughout the year to HIMSS staff or [chapters@himss.org](mailto:chapters@himss.org)
* Submit [chapter request form](https://surveys.himss.org/Checkbox/Survey.aspx?s=99cad66d3a984d2cb71ed44c8e4efee4) for collaboration approval, speaker assistance, or financial support
* Include [chapters@himss.org](mailto:chapters@himss.org) on all mass email distributions

## Q1 (July – September)

Submit [Chapter Board List & Governance](https://surveys.himss.org/checkbox/Survey.aspx?s=db0f0673287a4198affd3664414d7035) for Accountability Reporting | **Due July 1**

Update [chapter email address](http://clra.himsschapter.org/chapter-leader-emails) forwarding and board group email (password set my current owner)

Update chapter banking information and ensure a minimum of two signatories

Add updated board and/or chapter documents to [Engage](https://www.himssengage.org/chapters/pages/home.aspx) (or other document repository)

Update web and social presence

Chapter leaders review [bylaws](http://clra.himsschapter.org/bylaws-1), [policy manual](http://clra.himsschapter.org/policies-and-procedures), role descriptions, and specific chapter processes

New chapter leaders review [onboarding document](http://clra.himsschapter.org/chapter-leadership-academy) and attend [Chapter Leadership Academy](http://clra.himsschapter.org/chapter-leadership-academy)

Host board kick-off meeting and/or [leadership retreat](http://clra.himsschapter.org/elections-board-transition)

Notify membership and stakeholders of new chapter board

Submit [Self-Assessment, Budget & Annual Plan](https://surveys.himss.org/checkbox/Survey.aspx?s=0bd68da0cd9e405a808adc39ba882a74) for Accountability Reporting **| Due August 1** (discuss with chapter board awards submission through report)

Attend Chapter Leader Exchange

## Q2 (October – December)

US chapters submit [form 990](https://www.irs.gov/) to IRS | **Due November 15**

Submit [Financials](https://surveys.himss.org/checkbox/Survey.aspx?s=e51c16f3feb14a8bbb235364107843c6) for Accountability Reporting | **Due November 15**

## Q3 (January – March)

Board meets to discuss election planning and develop timeline

## Q4 (April – June)

Adhere to chapter’s [election](http://clra.himsschapter.org/elections-board-transition) timeline for open call for nominations, election processes, and announcement of winners/non-winners

Submit new FY board list to HIMSS staff immediately following election

Officer transition and potentially host officer transition meeting