**RIMS xx Chapter**

**Standard Operating Procedures (SOPs) Dated**

The purpose of the Chapter SOP is to clearly define the roles and responsibilities of the members of the Board, Officers and Committee volunteers, including project life cycles to assist with successful and timely completion of assigned tasks. These are supplemental to the xx Chapter Constitution and Bylaws. If there are any discrepancies between these SOPs and the Bylaws, the Bylaws will prevail.

**1 OFFICER AND BOARD EXPECTATIONS**

It is the expectation that all Officers and Board Members will make every effort to attend the majority of the regularly scheduled meetings, in addition to actively participating in events that involve or concern the Board, the local Chapter or Society interests; and review and respond to Board proposals, meeting minutes and other documents or records that are routed and collectively maintained by the Chapter or the Board.

If for any reason, a member cannot fulfill the obligations herein, it is the responsibility of that member to advise the President as soon as practicable, to enable the Nominating Committee to seek/identify an alternate member to assume and fulfill said responsibilities going forward for the benefit and best interests of the Board and our Chapter members.

**2 GENERAL CHAPTER INFORMATION**

 **2A Insurance Coverage**

The Chapter has the following insurance coverage provided by the Risk and Insurance Management Society:

**2B Federal Tax Identification Number (SS-4)**

The Chapter is assigned tax ID number: .

**2C Tax Exemption**

RIMS is a not-for-profit organization under [Section 501(c) 6](https://www.irs.gov/charities-non-profits/other-non-profits/types-of-organizations-exempt-under-section-501-c-6) of the Internal Revenue Code. This section affords RIMS tax exempt status. RIMS chapters are not automatically tax exempt but must seek exemption by filing Form 1024 with the IRS. xx requires additional filings for tax exempt status. In most cases, 501(c) 6 organizations are obligated to pay state and local tax for purchases and services rendered, in the name of the Chapter. RIMS and its chapters are not tax exempt.

**2D Chapter Website**

**3 OFFICERS**

 All Chapter Officers shall be Professional Members of RIMS

**3A President** – Act as the principal executive officer of the Board; subject to the control of the Board of Directors, shall, in general, supervise and control all of the business and affairs of the Board and Chapter; perform all duties incident to the office of President and other duties as may be prescribed by the Board of Directors; when present, preside at all meetings of the members and of the Board of Directors; and sign, with the Secretary, Treasurer, or any other proper officer of the Board as authorized by the Board of Directors, any instruments which the Board of Directors has authorized to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the Board of Directors to some other officer or agent of the Board or Chapter, or as required by law to otherwise be signed or executed. The term of President will be two (2) years. Maintain RIMS Society board of Director listing every election cycle.

**3B Vice President** – Shall perform the duties of President in the event of his/her absence for any reason and shall succeed in the role of President, when the term of the serving president expires. It shall be the Vice President’s further duty to counsel and assist the President in the administration of all business of the Chapter. The Vice President shall be responsible for arranging educational programming for Chapter meetings during their term. The term of Vice President will be two (2) years.

**3C Secretary** – Shall record all official actions of the Chapter and, in absence of a Chapter Administrator, shall issue all notices of meetings. Shall keep the minutes of the monthly Board meetings in electronic and/or hardcopy format; distribute draft monthly meeting minutes to the Board within ten (10) days following the meeting for review and response; incorporate Board feedback and finalize meeting minutes within one (1) week following initial distribution to the Board. In general, perform all the duties incident to the office of Secretary and such other duties as may be assigned by the President or by the Board of Directors; and make available all minutes of the Board meetings and/or other official records on the Chapter website within one (1) week of approval of the Board. There is no term limit for Secretary.

**3D Treasurer** – Shall be responsible for safe keeping the Chapter funds and keeping the Board informed of Chapter’s financial status. There is no term limit for Treasurer. Their responsibilities shall include the following:

1. Deposit all checks or cash promptly upon receipt and record, including source information.

2. Pay all bills within a reasonable period of time, e.g., within ten (10) days of receipt of invoice. Significant or unusual expenses should be approved in advance by the Board during the budget process or by the President.

3. Check credit card payment vendor account weekly and transfer funds to Chapter checking account as required.

4. Provide all financial information (deposits, transfers, checks, invoices, etc.,) for the previous month to the Chapter Accountant at the first of each month, or as soon as practical, for reconciliation and preparation of the monthly Profit/Loss Statement and Balance Sheet.

5. Provide the Board with a monthly Profit/Loss Statement and Balance Sheet prepared by the Chapter Accountant, prior to the monthly Board meeting.

6. Provide the membership of the Chapter the financial status of the Chapter at least once a year.

7. Report on any investments regularly, in accordance with the Chapter Investment Policy (e.g., quarterly or as deemed appropriate by the Board).

**Finance Recordkeeping**

The Treasurer shall keep a hard copy and a scanned copy (PDF) of the following:

* Deposit slips and copies of the checks;
* all invoices, with check number, date and amount written on the top of the first page;
* bank statements; and
* any other activity via debit cards should be provided to the Treasurer who will keep record of their use.
* Ensure that all Personally Identifiable Information (PII) and confidential information is appropriately handled in accordance with industry “best practices”, to include password protecting transmitted files via email.

**4 BOARD MEMBERS**

 **4A Board of Directors**

The Chapter's Board shall consist of no less than nine (9) and no more than thirteen (13) Directors. Directors shall be elected in advance of the Annual Planning Meeting by a majority of those members present at the meeting or via email sent to all active members of the Chapter. Those elected shall take office on the first (1st) day of September, and shall serve until the expiration of their term of office or until their successors have been elected and approved. The Board of Directors serve three (3) year terms that are staggered so as not all Directors terms are up at the same time. Newly elected directors my serve either an initial one (1) or two (2) year term during their first term on the Board in order to complete the term of an outgoing director. All Chapter Directors shall be Professional Members of RIMS. The Chapter President and the Chapter Delegate to the RIMS House of Delegates shall be members of the Chapter Board of Directors.

The Chapter's Board of Directors shall elect officers of the Chapter and shall assume the general management of all affairs of the Chapter.

**4B Associate Advisory Board Members**

The Board may, at its discretion, may appoint two (2) Advisory Board Members to each serve a three-year term. Advisory Board Members are Associate Members of the Chapter (e.g., not acting as risk managers, but may be from service providers and other supporting and related organizations). Advisory Board Members do not have voting privileges. Advisory Board Members assist the Board with Chapter affairs and may also serve as chairs of Chapter Committees.

**4C Student Advisory Board Member**

Additionally, the Board may, at its discretion, appoint a Student Advisory Board Member to serve up to a two-year term. The Student Advisory Board Member must be currently enrolled in the university’s Risk Management & Insurance (RMI) program and be either a junior or senior.

No voting privileges are provided to the Student Advisory Board Member.

**4D New Board Member Orientation & Training**

When new Board members begin serving on the Board, there shall be an orientation for the new Board member(s). Such orientation shall take place within one month of the inception of Board service. Led by the President and consisting of no fewer than two (2) additional Board members, the new member(s) shall be provided the Chapter Bylaws, Financials, Standard Operating Procedures (SOPs) and other pertinent information so that they can immediately assist in the general management of the Chapter.

**4E Recognition**

Acknowledgement and appreciation shall be made for Board Members that have served and are exiting the Board for any reason. At a minimum, a Certificate of Appreciation should be presented at their last Board meeting or Chapter meeting. Consideration may also be given to provide a gift card or monetary item for exiting members, depending on the length of service at the discretion of the Board.

**4F Vendor Selection**

The Board as a whole is responsible for vetting vendors/service partners on behalf of the Chapter to ensure that the Chapter is meeting or exceeding fiduciary responsibilities by engaging reliable firms to assist with Chapter affairs.

**5 DELEGATES**

**5A RIMS Chapter Delegate**

Elected by the Board, the Chapter Delegate acts as communication liaison between the Chapter and the RIMS Society leadership, representing the Chapter’s concerns and interests to RIMS at large, as well as reporting on RIMS directions and activities at the local Chapter level. It is the Delegate’s responsibility to communicate to the Chapter when it is necessary to make changes in the Chapter Constitution and Bylaws required to comply with constitutional changes in the RIMS Constitution and Bylaws.

In the event that a Delegate cannot be present at a meeting of the House of Delegates, the Chapter may designate an alternate Delegate by providing written notification of the name and address of the alternate Delegate to the Secretary of RIMS Society prior to the commencement of the meeting of the House of Delegates.

**5B Western Regional Conference (WRC) Delegate**

Elected by the Board, the Chapter WRC Delegate attends the annual WRC, attends the meeting of WRC Delegates, and reports back to the Chapter regarding the results of the conference, items of interest, scheduling and rotation of future WRCs and other related information.

**6 COMMITTEES**

**6A Nominating Committee**

The Nominating Committee (NC) shall consist of up to one (1) Board Member (preferably a past President of the Chapter) who will serve as the NC Chair and at least two (2) Professional Chapter members. Vacancies on the committee may be filled by either the Chapter President or the NC Chair. The NC Chair shall deliver to the President not later than forty-five (45) days prior to the Annual Meeting, the names of its nominees for each elective office or Board position, together with a signed acceptance from each nominee that they are willing to serve and have the support of their employer. Only candidates placed in nomination by this committee, or by petition, shall appear on the ballot to be voted on in the annual election, to be held by email ballot. From time to time, the NC may be called upon to provide nominees for vacancies that occur during the year and outside the normal election process. The NC shall create a pipeline of eligible members interested in serving on the board in the event they are needed to complete another Board members term.

**6B Communication**

The purpose of the communication committee is to develop and maintain a means to communicate Chapter business to the membership of the Xx Chapter. The committee shall be made up of members of the Chapter and does not require a Board Member on the committee or as the chair of the committee. The communication committee is responsible for the following communications.

Chapter Newsletter – the Chapter newsletter is to be published on a quarterly basis via email and at a minimum contain the following content:

* President Letter
* Upcoming Events/Meetings
* New Member listing
* Overview of past events
* Sponsorship acknowledgement
* Student section

Chapter Website – the Chapter website is maintained by the Chapter Administrator. The Communication Committee should work with the Chapter Administrator to forward key publications for posting to the website. The website should contain at a minimum the following information for the Chapter (Not all of the items below are the responsibility of the Communication Committee).

* Current Bylaws
* Membership Information
* Upcoming meeting announcement
* Board Meeting Minutes
* Newsletters
* Current year program schedule
* Prior meeting presentations
* Job posting - must be approved by the President prior to posting
* Contact information

Membership Survey – a membership survey should be sent out to membership on at least an annual basis (typically in July) to assist in planning for the following year. The survey is produced via Constant Contact and results are to be summarized by the Communication Committee and distributed to all Board Members. Committee chairs have the responsibility of reaching out to those who have indicated an interest in serving on committees. The Board may elect to generate additional survey(s) mid-term to ensure programming is on track and results are in alignment with Member expectations.

**6C Community Service**

The purpose of the community service committee is to make a meaningful contribution benefiting our community through significant involvement of Chapter resources and members. The goals of the committee are:

* Investigate and propose Risk-driven community service projects within the Xx region
* Promote risk and safety awareness
* Protect and enhance the quality of life
* Obtain broad participation of the Xx RIMS membership
* Create an awareness of RIMS

**6D Professional Development**

The Professional Development Committee is the liaison between universities and their respective Risk Management and Insurance (RMI) programs. The committee provides a budget at the beginning of each fiscal year on the financial contributions the Chapter will make to each university during that fiscal year. The budget will include cost for sponsoring students at the Chapter’s monthly membership meetings and Risk Management classes and tests for members. This budget is reviewed, discussed and approved by the Board of Directors each year at the Board’s annual Board planning meeting. The committee chair then advises each university on the contributions it can expect for the upcoming fiscal year. The committee also coordinates with UCD to sponsor students who desire to attend the Chapter’s monthly membership meetings. The committee works closely with the Chapter Administrator on getting out notifications for sponsoring these students. The committee also oversees the notification and selection of Chapter members to take a Risk Management course or test The Chapter pays the expense of the course or test.

**6E Finance**

The Finance Committee shall be accountable for the oversight of existing policies and procedures undertaken by the Chapter Treasurer and retained third party consultants, as applicable. The purpose of the Finance Committee is to ensure internal controls are followed and to ensure transparency of the Chapter finances on behalf and for the benefit of Chapter members.

Key areas of responsibility shall include:

* Treasurer Oversight:
	+ Annual review of Treasurer’s responsibilities and duties to ensure compliance with Chapter finance related policies and procedures, including the Investment Policy.
	+ Assist Treasurer in training new incoming Chapter Treasurer regarding Finance policies, procedures and controls.
	+ Review banking relationship(s) and submit recommendations to the Board as needed.
	+ Oversee budget process to ensure budget submission is presented to the Board in a timely manner prior to calendar year submission.
* Chapter Accountant Oversight:

Either independently, or acting jointly with the Chapter Treasurer:

* + Annual review of Chapter Accountant objectives, responsibilities and performance.
	+ Ensure Chapter Accountant performs accurate and timely annual tax reporting duties. To include:
		- Annual tax filing to ensure that the process remains on track for timely and accurate submission to maintain federal and state tax exemptions as a not-for-profit organization and as required by law.
	+ Transfer all applicable tax records to the Treasurer.
* Board Reporting: Report to the Board as needed, and not less than annually.

**6F Fundraising**

Responsible for leading all Fundraising Committee members’ activities.

Responsible for coordinating the team’s contacts, and also personally engaging with Chapter Members to sell sponsorship categories, as set by the board of directors. To include but not limited to:

* Contacting potential sponsors to solicit new sponsorships.
* Engaging with existing sponsors to renew sponsorships
	+ Upselling sponsors to higher levels of sponsorships
* Coordinating with the Golf committee as to those sponsors who purchased a sponsorship that includes benefits at the golf tournament.
* Coordinating with the Educational Forum committee as to those sponsors who purchase a sponsorship that includes benefits at the Educational Forum.
* Reporting to the BOD status of sponsorship status, including funds raised and still need to be collected.
* Coordinating and tracking with Treasurer (and Chapter Administrator) regarding the funds received.
* Coordinating with the Chapter Administrator regarding Invoicing of committed sponsors for their chosen sponsorship levels.
* Review current sponsorship levels each year
	+ Recommending to the BOD revised/new sponsorship levels for the next calendar year.
* Develop new sponsorship opportunities

**6G Golf**

 Responsible for all logistics associated with the Annual Fundraising Event including:

* Selection of Venue;
* Negotiating a Contract (greens fees and F&B, Pro Shop GC) with the Venue;
* Developing a Budget (golf, F&B, prizes [door prizes and prizes for each golfer], signs, banners and brochures, appreciation gift for volunteers, hole in one insurance) as well as pricing for event;
* Handle registration of players and sponsors;
* Collect funds and submit to Treasurer;
* Make starting hole assignments;
* Evaluate the event and provide feedback to the Board and Venue.

Committee Assignments:

Volunteers Coordinator – solicit chapter members to assist with: golfer registration and check-in, sale of putting string and mulligans, assign witnesses at the par 3 holes for contests and prizes, assign rovers to pass out snacks on the course and relieve hole witnesses or other volunteers as necessary. Ensure that all volunteers are transported back to the club house at the end of the tournament. Call for volunteers can be completed in various ways including announcements & sign-up sheets at monthly meetings, e-mail blast to all members from Chapter Administrator, etc. Call for volunteers should start a couple of months in advance of the event. Communicate and confirm with volunteers well in advance of the event, sending reminders, confirmations, and station assignments in advance of the event.

Prize Coordinator - work with vendor(s) to obtain: the “annual” prize for each golfer, door prizes and gift cards.

Printing Coordinator – work with vendor(s) to obtain: banners, signs and brochures; will also need to work with Sponsors to collect appropriate logos for use and the chapter President for the welcome letter.

Sponsor Coordinator – recruit/encourage Sponsors to not only provide funds for the event, but also to have people staff a hole and network with the golfers. Identify what F&B they may be providing, so they can be strategically placed on the course.

**Golf Timeline**

July - August - Present final accounting to the Board for the last tournament, organize committee for next year, make committee appointments (chairman, food, prizes, program, signs, volunteers, registration, fund raising (sponsor solicitation), select golf course, negotiate pricing with the course, obtain contract and present to the Board for approval at the fall retreat, make deposit payment to the course selected.

September – November - Negotiate food/drink menu and pricing with the golf course.  Contact major sponsors and advise what costs will be for the next year.

December - draft budget for the tournament, set goal for fund raising, set price for playing, present to the board for approval

January - send out "save the date" notices to all members, players from the last year, insurance companies, brokers, etc., hand out at Jan. meeting  Set menu for the tournament.  Send out first request for sponsors (remember to request logos)

Late February or early March - open registration for players, provide registration form on line, at meetings, etc.

April - meet with the course to establish tournament rules, order hole in one insurance (Beecher Carlson, has provided lead sponsorship), select prizes, order any logo'd items (golf balls, hats, whatever), request members volunteer to help on the day of the tournament, arrange test round at the selected golf course for committee members

May - send information packet to sponsors - i.e. when to arrive, what to bring/not bring, provide information on who to contact at the course for catering information. Order signs, design program, Presidents letter.

June – manage all last minute details

**6H External Affairs**

This committee is charged with tracking all state and federal legislation which may impact risk management, safety and the insurance industries.

* Monitor all proposed legislation at the Xx Legislature and related legislatures, including Congress; provide updates which may have a positive or negative effect on risk management, insurance or safety operations in Xx and other areas of interest (may be discussed at the Board level, and/or included in the quarterly newsletter, etc., as deemed appropriate).
* Coordinate the Insurance Day at the Capitol (if being held) with the Xx Insurance Association and other interested organizations.
* Attend and encourage others to attend RIMS Legislative Summit
* Monitor Federal and Other State Legislative agendas for matters of interest to our membership.
* If needed given legislative agendas, organize congressional visits with members while they are home on the late summer recess.

**6I Membership**

The two main purposes of the Membership Committee are recruitment and retention.

**Recruitment**

* Goals - Committee goals should be based on the long-range and annual goals of the Chapter. Growth can have an impact in many areas, e.g., a large influx of members may cause a need for larger meeting facilities.
* Membership Prospects – Identify potential new members via several means. Good resources of possible new members include individuals who approach RIMS locally or nationally for information or guests that attend the meetings. These prospects should be called and encouraged to join.

Lists can be generated of previous members whose memberships have lapsed, lists of potential members that other Board Members are aware of or by cold-calling from a list of large and/or headquartered firms in the area.

* Invite to Participate - Committee members can call and invite prospects to attend a meeting (typically at no charge) to experience the Chapter. Arrangements should be made to meet the guest to introduce them around and make them feel comfortable.
* Follow-up – The prospect should receive a call prior to the next membership function to solicit feedback, encourage membership and provide any follow-up information or materials to help in their consideration. If amenable, the prospective member should be helped through the membership process.
* Official Campaign – RIMS International has a wide variety of materials and tools to start an official membership campaign. Although the Membership Committee leads the club’s recruiting efforts, recruiting new members is a responsibility of each Chapter member. The Membership Committee should encourage all members to reach out to colleagues and/or their brokers, vendors. A campaign to reward members who bring in the most new members can be considered.

**Retention**

* Involvement – Retention should begin right at the beginning of a new membership. Every effort should be made to inform, orient and involve new members to ensure long-term participation and success. A mentor can be assigned to get them involved. Queries about their areas of interest can help flush out committee volunteer opportunities and connections with those Committee Charis should be facilitated.
* Expired & Expiring Members – Reports on members that have expired or are expiring in the next 90 days should be reviewed on a regular basis.
	+ - Expired members should be called to find out if it was an intentional lapse or accidental. If the former, the committee members should ask why it didn’t work out for them and encourage a new path of involvement. If the latter, they should be walked through the renewal process.
		- Members on the verge of expiring can be gently nudged at the monthly meeting to renew to watch for their notice.
* Renewal Process for Associate Members – The Membership Committee should help the Chapter Administrator during the Associate Member annual renewal process, calling members that don’t respond and ensuring they understand the various levels of membership and the benefits.

Committee Members - Committees should meet regularly to discuss ongoing projects and new initiatives, to develop better strategies for recruitment and to discuss committee and Chapter goals.

* Registration Activities – The Membership Committee oversees the registration process at each Chapter Event. This requires setting up the name badges so that members who have paid in advance can just pick them up on the way into the meeting and being prepared to collect funds that are owed and register members at the door. Ensure that all Personally Identifiable Information and confidential information is appropriately handled in accordance with industry “best practices” and that any cash payments are safe and secure.

**6J Chapter Awards**

This committee is determined at the annual retreat. If employed, the Chapter Award committee is responsible for tracking pertinent information throughout the year for including with applications and completing the Chapter awards application(s).

**6K Scholarship Committee**

The goal of this committee is “To promote Risk Management in the student community through scholarship awards and increased awareness”. It supports both NMSU and UCD and their respective Risk Management and Insurance (RMI) programs.

The budget will include bi-annual scholarships, funding to attend the annual RIMS Society Conference, the annual Western Regional Conference and other student related activities as annually approved by the board of directors.

Timeline:

|  |  |
| --- | --- |
| January 18th | Send announcement with Scholarships for Spring semester |
| February 1st | Deadline for receiving applications  |
| February 10th | Review applications and award scholarships |
| February Mtg | Recognize recipients |
| August 22nd | Send announcement with Scholarships for Fall semester |
| September 4th | Deadline for receiving applications  |
| September 13th | Review applications and award scholarships |
| September Mtg | Recognize recipients |

**7 CHAPTER SUPPORT**

The Chapter engages the services of outside support to fulfil certain functions such as Chapter Accountant and Chapter Administrator. These roles are not employees of the Chapter. They are contractors, required to submit monthly invoices and are also required to file as 1099 contractors.

**7A Chapter Accountant**

The Chapter Accountant reports to the Treasurer with oversight from the Finance Committee and is responsible for the following duties:

* At the first of each month, or as soon as practical, work directly with the Treasurer to ensure the receipt of all prior month required financial information (deposits, transfers, checks, invoices, etc.,), in order to prepare and reconcile the monthly Profit/Loss Statement and Balance Sheet;
* Create a Monthly Profit/Loss Statement and Balance Sheet and submit to the President, Vice President and Treasurer by the 10th of each month. Include any notes to explain any variances; and
* When a budget is approved by the Board, input that data and include another column with actual to budget amounts with notes for variances.

**7B Chapter Administrator**

Responsible for maintaining web-site, responding to Chapter emails, updating membership information, notification and management of monthly meetings and new member emails.

Monthly Meeting Administration

About 3.5 weeks prior to meeting:

* Request meeting information from Vice-President (if not already available)

*Once received*

* Update Constant Contact, including meeting Event Spot and Meeting Survey
* Draft Meeting Notice
* Update Website

Three weeks prior to meeting:

* Send meeting notice to membership

Upon receipt of students in need of sponsorship:

* Email membership regarding student sponsorships

Friday prior to meeting:

* Send meeting reminder to membership

Monday prior to meeting:

* Ensure that speaker is registered; if not, register him/her
* Ensure that students are registered; if not, email them
* Send email to Vice-President with a list of dietary restrictions
* Individual detail not needed, just how many individuals with each restriction
* Send draft registration list to Vice-President
* Send email to people who registered with dietary restrictions
* Send email to people who registered and owe money

Prior to meeting:

* Arrange for name badge/meeting material pick-up date/time
* Pull and stuff name badges, alphabetize in badge boxes
* Print two copies of registration list
* Provide extra name badges, badge stock, receipts, pens, etc.

Wednesday prior to meeting:

* Draft survey email (include link to presentation, if available)
* Send email to Vice-President and Membership Chair with registration list

Friday after meeting:

* Make presentation live on website (if available)
* Send meeting survey to participants

Upon receiving post meeting materials:

* + Review registration list and send invoices to those who did not pay amount owed and those who registered on-site without payment. Ensure that all PII and confidential information is appropriately handled in accordance with industry “best practices”.
* Re-file name badges

One week after meeting:

* Send survey results to Vice-President

New Member Administration

* RIMS Chapter Membership Roster is kept as an Excel File
* Notification of new chapter members come in two ways:
* From National RIMS, via the RIMS Chapter President (once approved)
* From the RIMS Chapter Treasurer (when application and payment is received)
* When notified of new member, proceed with the following steps:
* Add member information to the Chapter Membership Roster
* Convert Membership Roster to PDF
* Send Member welcome email (drafts for professional and associate members are both in the RIMS Chapter Gmail account) with the following attachments:
	+ - * Welcome Letter from the President
			* Program Schedule
			* Professional Membership Roster
			* Associate Membership Roster
* Save updated Membership Roster to the Chapter Gmail account Google Drive

**8 CHAPTER CALENDAR TIMELINE**

January

* Finalize plans for Chapter event at Annual Conference
* Invoice for sponsorships that have been obtained so far
* Invoice for Associate Member renewals
* Issue RIMS Awards application(s)
* UCD Scholarships – Spring Semester

February

March

April

* Annual Conference

May

* Plan for Board Planning Meeting

June

* Golf Tournament

July

* NC provides nominees to Secretary of Chapter, along with signed acceptance from each nominee, no later than 30 days prior to the Annual Meeting

August

* Other nominees (e.g., from Chapter members) may elect to utilize the write-in option on the ballot.
* Ballot mailed to membership no later than 15 days prior to Annual Meeting
* UCD Scholarships – Fall Semester

September

* Board elects officers of the Chapter Board
* Begin plans for Chapter event at Annual Conference
* Board Annual Planning Meeting

September / October

* Xx Forum

November

* Send requests for sponsorships for coming year
* First meeting of awards committee to begin awards application process

December

* Complete applications for Chapter Awards (due in early January)