

# Chapter Planning and Operations Checklist

This checklist is designed to support Fulbright Association chapters in planning, organizing, and sustaining their activities throughout the year. It outlines key responsibilities, suggested timelines, and recommended roles to help chapter leaders stay on track while balancing the realities of volunteer leadership.

The dates included are approximate and reflect when these activities typically occur year to year. Specific deadlines may shift slightly, so chapters should use this as a planning guide rather than a fixed schedule. Similarly, while responsible roles are suggested for clarity and accountability, chapters are encouraged to adapt responsibilities based on their board structure and capacity.

The President is ultimately responsible for ensuring that all core tasks are completed, even when responsibilities are delegated across the board. This document is intended to be a flexible, practical tool—one that helps chapters plan ahead, communicate effectively, and build sustainable leadership and programming over time.

<b>Task</b>	<b>Month</b>	<b>Suggested Responsible Role</b>
Submit Spring Cycle Grant Proposals	January	President + Vice President
Receive grant decisions & communicate internally	January	President
Submit Fall Event Reports (Aug–Dec events)	January	President + Secretary
Send mid-year membership check-in/reminder	January	Communications Chair
Conduct mid-year board check-in	January	President
Submit Annual Report	February	President + Secretary
Review election instructions	March	Secretary
Participate in advocacy outreach	March–August	Advocacy Chair + President
Promote open board positions & leadership opportunities	March	Secretary + Membership Chair + Communications Chair
Submit open board positions	March	President + Secretary
Develop advocacy plan aligned with national priorities	April	Advocacy Chair + President
Review 990-N instructions	April	Treasurer

Promote call for nominations	April	Communications Chair
File 990-N	May	Treasurer
Promote voting to membership	May	Communications Chair
Ensure election completion	May	President + Secretary
Recognize outgoing board members	June	President + Communications Chair
Transition to new board	June	President
Announce new board	June	Communications Chair
Attend new board orientation	June	All Board
Conduct board transition/handoff meeting	June	Outgoing + Incoming President
Share documents, passwords, and key contacts	June	Outgoing Board
Confirm access to bank, email, and tools	June	Treasurer + President
Set annual board meeting schedule	June	President + Secretary
Set chapter goals/priorities for the year	June	President + Board
Establish internal communication channels	June	President + Secretary
Check in on spring events	June	President + Vice President
Begin planning fall programming	June	Vice President
Hold Summer Programming Strategy Session (Fall planning)	June	President + Vice President + Board
Submit Early Fall Event Proposals (August events)	July	President + Vice President
Attend Grant Q&A	July	President + Vice President
Submit Early Fall Event Proposals (August events)	July	President + Vice President
Launch membership renewal campaign	July–August	Communications Chair + Membership Chair
Confirm grant fund spending	August	Treasurer
Submit Spring Event Reports (Jan–July events)	August	President + Secretary
Submit Fall Cycle Grant Proposals	August	President + Vice President

Receive fall grant decisions & begin planning	August	President
Submit Final Grant Reports (internal tracking)	August	President
Promote conference participation	August	Communications Chair
Promote Leadership Awards nominations	September	Communications Chair
Leadership Awards open (Sept 1–25)	September	Communications Chair
Submit Leadership Awards nominations	September	As needed
Register for conference & stipends	September	As needed
Identify potential future board members	September–November	President + Membership Chair
Engage prospective leaders (1:1 outreach)	September–November	President + Board
Invite prospective leaders to events/meetings	September–November	Membership Chair
Promote events (2–3 weeks in advance)	Ongoing	Communications Chair
Welcome new members	Ongoing	Membership Chair
Hold regular board meetings	Ongoing	President
Invite congressional staff to events	Ongoing	Advocacy Chair + President
Distribute conference stipends to attendees	November	Treasurer
Hold Winter Programming Strategy Session (Spring planning)	November	President + Entire Board
Submit Early Spring Event Proposals (January events)	December	President + Vice President