

SFPE CHAPTER LEADER TOOLKIT

Chapter Leader Annual Calendar

A month-by-month guide to running your SFPE chapter — tied to the resources in the Chapter Leader Toolkit.

This calendar lays out a typical chapter year. Adjust the timing to match your chapter's own bylaws, fiscal year, and election cycle — the tasks and toolkit resources stay the same regardless of when your chapter's year starts.

Q1 — January to March: Start the Year

When	Task	Toolkit Resource	Lead Officer
Jan	Confirm/onboard newly elected officers; review chapter bylaws and roles with incoming board	Chapter Leader Survival Manual	President
Jan	Update officer roster with SFPE HQ	Officer Roster online form	Secretary
Jan–Feb	Set the year's budget and review prior-year financials	Chapter Treasurer's Toolkit	Treasurer
Feb	Annual Chapter Activity Report reporting window opens (check sfpe.org for exact dates)	Annual Chapter Activity Report	President / Secretary
Feb–Mar	Begin sponsorship outreach for the year's events	Sponsorship Program Guide	Treasurer / VP

Q2 — April to June: Report & Review

When	Task	Toolkit Resource	Lead Officer
Mar	Submit Annual Chapter Activity Report	Annual Chapter Activity Report portal	President / Secretary
Apr	Plan spring events / STEM outreach for the school year	STEM Resource Guides (Elementary–College)	Outreach Chair
May	US chapters: confirm IRS Form 990 filing status is current (due the 15th day of the 5th month after fiscal year-end for calendar-year filers)	"A Walk Through Form 990" webinar	Treasurer
May–Jun	Mid-year financial check-in against budget	Chapter Treasurer's Toolkit	Treasurer

Q3 — July to September: Sustain Momentum

When	Task	Toolkit Resource	Lead Officer
Jun–Jul	Promote summer events and membership renewal reminders	Communication Templates	Communications Chair
Jul–Aug	Use chapter hashtags to boost visibility for events on social media	How to Use Hashtags guide	Communications Chair
Aug	Mid-year gap check: is the chapter's nonprofit status current? (esp. after officer turnover)	Reinstating Non-Profit Status webinar	Treasurer
Aug–Sep	Start planning the nomination process for next year's officer elections	Nomination Process webinar (Rocky Mountain Chapter)	Nominating Committee / President

Q4 — October to December: Elect & Plan Ahead

When	Task	Toolkit Resource	Lead Officer
Sep–Oct	Plan and promote fall fundraising or flagship event	Fundraising Event webinar (NY Metro Chapter); Event Planning Basics course	VP / Events Chair
Oct	Open officer nominations to the membership	Chapter Leader Survival Manual (succession planning)	Nominating Committee
Nov	Hold officer elections for the coming year	Chapter bylaws	President
Nov–Dec	Draft next year's budget; review sponsorship renewals	Chapter Treasurer's Toolkit; Sponsorship Program Guide	Treasurer
Dec	Send outgoing/incoming officer handoff notes and update records	Officer Roster online form	President / Secretary

Ongoing / As-Needed

When	Task	Toolkit Resource	Lead Officer
Ongoing	Update the officer roster within ~30 days of any change	Officer Roster online form	Secretary
Ongoing	Reference the 50 Tips guide when planning meetings or troubleshooting engagement	50 Tips for Building a Stronger Chapter	All Officers
Ongoing	Watch for ACE Award eligibility as the chapter completes activities worth reporting	ACE Award Recipients page	President

Note: Filing deadlines (e.g., IRS Form 990) and the Annual Chapter Activity Report window are set by outside authorities or SFPE HQ and may change year to year — always confirm exact dates on sfpe.org or with a tax professional before relying on the dates above.