Boards in Gear: Annual Calendar Worksheet

There are key activities related to each chapter of the guide that you should capture on your organizational calendar annually. You may have other activities important to your board and organization to add the calendar. Use the next page to map out activities for each month.

Note: Requirements listed under Chapter 2. Responsibilities may vary depending on your organization type and local jurisdiction.

Updated: August 2022

Chapter 1. Connection to Cause	Chapter 2. Responsibilities	Chapter 3. Composition & Development	Chapter 4. Board Operations	Chapter 5. Fundraising
❑ Review everyone connected to achieving your mission ❑ Map opportunities to build connection with decision-makers & potential supporters	❑ Review & approve budget ❑ Review & sign Conflict of Interest Policy ❑ **Federal:** File IRS Form 990 ❑ **State:** Nonprofit corporation – annual report ❑ **State:** Charitable organization – annual renewal ❑ Lay out plan for executive director evaluation & compensation review	❑ Review process to recruit, select, & orient new board members ❑ Schedule new board member orientation ❑ Evaluate the board ❑ Create ongoing learning plan for board & schedule trainings	❑ Create meeting calendar that facilitates & supports full participation ❑ Discuss intentions for strategic plan development or refresh process	❑ Connect budget to fundraising plans ❑ Create individual fundraising plans for board members ❑ Update print, digital, & other resources for fundraising work ❑ Generate current donor list for planning

YEAR:

January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					