



## Chapter Compliance Checklist

### August 1

- \_\_\_\_\_ Board Slate for Following Fiscal Year  
CLRP > Compliance > August 1 Compliance

### December 1

- \_\_\_\_\_ Volunteer Leader Agreement – all Board members must complete Board 101 & Harassment Training prior to signing. Chapter Leaders will sign form electronically with PDF sign.
- \_\_\_\_\_ Strategic Business Plan
- \_\_\_\_\_ Budget
- \_\_\_\_\_ 18–24-month Chapter Calendar of Events
- \_\_\_\_\_ Current & Updated Bylaws and Policy Manual  
CLRP > Office of the President > Governance
- \_\_\_\_\_ Paid Chapter Administrator (if applicable)
  - \_\_\_\_\_ Annual Evaluation  
CLRP > Office of the President > MPI Chapter Board Service
  - \_\_\_\_\_ Copy of Contract/Business Service Agreement: only when renewal or new contract is executed.
  - \_\_\_\_\_ License; only when renewal or new contract is executed.
  - \_\_\_\_\_ Proof of Chapter Administrator Insurance
  - \_\_\_\_\_ Chapter Operations Form, if a new Administrator  
CLRP > Office of the President > Succession & Transition Planning
- \_\_\_\_\_ MPI Chapter Trademark License Agreement (to be signed once then referenced for each new Chapter President.)
- \_\_\_\_\_ Submit the Chapter Representative for the Regional Council

### Local Tax Deadline

- \_\_\_\_\_ File annual tax return

## **Additional Compliance Requirements**

1. Regular Members Meetings (notice at least 20 days prior to meeting) - *Chapter Bylaws Article V, Sections 1 and 4)*
2. Minimum of four educational events annually - *Chapter Policy Manual, Article VII, Section 1*
3. One Annual Members Meeting – *Chapter Bylaws Article V, Section 2*
4. Officers – a minimum of 5 officers filling 7 minimum roles – *Chapter Bylaws Article VI, Section 1*
5. Board retreats – one annual retreat is required (with MPI-Verified Facilitator) – *Chapter Policy Manual Article IV, Section 2*
6. Paid administrators must meet all requirements - *Chapter Policy Manual Article V, Section 7*
7. Adhere to brand standards and trademarks - *Chapter Policy Manual Article VIII, Section 1*
8. Dashboard monthly data, Sitefinity (website platform), QuickBooks online - *Chapter Bylaws article 1. Name and Location, section 2. Chapter*

## **For Non-Compliance Refer to MPI Chapter Policy Manual**

### Article IX – Miscellaneous, Section 3 – Non-Compliance

3.1 Chapters may not be eligible for annual chapter performance awards and metrics incentives if they are not compliant with the MPI Chapter Bylaws and the MPI Chapter Policy Manual.