



## Chapter Compliance Document 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
- \_\_\_ Chapter Operation form  
CLRP > Compliance > December 1 Compliance
- \_\_\_ 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
- \_\_\_ MPI Chapter Trademark License Agreement (to be signed once then referenced for each new Chapter President).

### Local Tax Deadline

- \_\_\_ Copy of annual tax return (Non-U.S. Chapters)