

APPENDIX G - REGION OPERATING CALENDAR FOR FISCAL YEAR

NOTE: Please refer to the Region Operating Guide and the Institute Administrative References for detailed information about subjects covered below and to reconfirm due dates for nominations for awards, Institute offices, and other events. The following list details the responsibilities for Chapters, Institute Directors, and Region Chairmen.

A. JULY

1. Chapter President (P)
 - a. Propose Chapter goals for year.
 - b. Propose Chapter Membership, Education, Technical, Awards, and Publicity programs for year.
 - c. Present tentative Newsletter production schedule for year.
 - d. Revise newsletter mailing list to include new Institute Directors and new Region Chapter Presidents, President Elects, and editors.
 - e. Present proposed Chapter budget for year.
 - f. Discuss nominee for Southwest Region Institute Director (if applicable).
 - g. Appoint committee for nomination of Fellows and Institute Awards and Honors.

2. Institute Director (D)
 - a. Identify Institute attendees to Region Conference - due August 1. Notify Host chapter.
 - b. Send proposed changes to Southwest Region Operating Guide to Institute Directors.
 - c. Assist Region Finance Chairmen/Treasurer to send statements for Region assessments - due July 31
 - d. Distribute Institute goals to all Region Committee Chairs.

3. Region Chairmen (C)
 - a. Region Finance Chairmen/Treasurer send statements for Region assessments - due July 31 (assisted by D)
 - b. Region Awards Chair distribute nomination submittals and convene review boards
 - c. Attend 'Mega Weekend' or comparable Institute Training for Region Committee Chairs.

B. AUGUST

1. Chapter President (P)
 - a. Approve Chapter goals and objectives for year
 - b. Approve Chapter Membership, Education, Technical, and Publicity programs for year

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- c. Approve Newsletter production schedule for year.
 - d. Approve Chapter Budget for year.
 - e. Approve Nominee for Southwest Region Institute Director (if applicable).
 - f. Chapter Audit Committee report due.
 - g. Confirm Chapter Delegates to SW Region Conference, and send names to Institute Directors.
 - h. Send Region assessments to Region Finance Chairmen/Treasurer - due August 31..
 - k. Region Business Meeting Agenda Items due August 31.
 - i. Prepare Chapter Report for Region Conference and make required number of copies
 - j. Remind members of Southwest Region Conference and discuss group transportation
2. Region Chairmen (C)
- a. Region Awards Committee discusses awards nominations - report due to Directors September 1.
3. Institute Director (D)
- a. Directors determine Chapter Growth Award and Southwest Region Institute Directors Citations

B. SEPTEMBER

1. Chapter President (P)
- a. Discuss possible nominees for Institute Awards. See Administrative References for due dates and nomination forms
 - b. Confirm detailed planning of various Chapter programs
 - c. Discuss Region Conference business meeting agenda items with your chapter and with Institute Directors
 - d. Discuss future special Chapter programs such as product fairs and seminars
 - e. Progress report on Fall Membership Drive.
 - f. Discuss possible nominees for Institute Awards. See Administrative References for due dates and nomination forms
 - g. Confirm detailed planning of various Chapter programs
 - h. Discuss Region Conference business meeting agenda items.
 - i. Discuss future special Chapter programs such as product fairs and seminars.
 - j. Attend Region Conference.
2. Region Chairmen (C)

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- a. Attend Region Conference.
 - b. Discuss Region Conference business meeting agenda items with each chapter chair and with Institute Directors
- 3 Institute Director (D)
- a. Attend Region Conference.
 - b. Discuss Region Conference business meeting agenda items with Chapters and with Region Chairmen

C. OCTOBER

- 1. Chapter President (P)
 - a. Review Chapter Bylaws.
 - b. Progress report on Fall Membership Drive due to Institute Directors.
 - c. Institute Directors send Southwest Region Institute Director Nominations to Institute - due October 30.
 - d. Nominations by petition of Institute officers due at Institute office during October
 - e. Remind members of CSI Specification Competition deadline for submittals.
 - f. Work on Institute awards submittals.
- 2. Region Chairmen (C)
 - a. _____
- 3. Institute Director (D)
 - a. _____

D. NOVEMBER

- 1. Chapter President (P)
 - a. Discuss resolutions for Institute Annual Meeting. Notify Directors if resolutions are desired.
 - b. Work on submittals on Institute awards and honors.
 - b. Remind members of Certification Examination applications - due January 15 (Exam first Saturday in April).
- 2. Region Chairmen (C)
 - a. Remind members of Certification Examination applications - due January 15 (Exam first Saturday in April).
- 3. Institute Director (D)

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- a. Remind members of Certification Examination applications - due January 15 (Exam first Saturday in April).

E. DECEMBER

- 1. Chapter President (P)
 - a. Remind members of Certification Examination applications - due January 15. (Exam first Saturday in April.)
 - b. Prepare Institute Awards submittals - due February 1.
 - c. Mail submittals for Fellowship - due February 1.
 - d. Discuss suggestions to Institute Directors for Institute Committees.
 - e. Discuss Chapter dues changes - due February 28.
 - f. Discuss resolutions for Institute Annual Meeting.
 - g. Appoint Chapter Nominating Committee.
- 2. Region Chairmen (C)
 - a. _____
- 3. Institute Director (D)
 - a. _____

F. JANUARY

- 1. Chapter President (P)
 - a. All (?) Certification Exam applications due January 15.
 - b. Submit Institute Awards and Fellowship nominations - due February 1.
 - c. Discuss Chapter dues changes - due February 28.
 - d. Submit resolutions for Institute Annual Meeting - due February 1.
 - e. Send suggestions for Institute Committees to Southwest Region Institute Directors - due January 15.
 - f. Fellowship and Institute Awards submittals - due February 1.
 - g. Institute Annual Meeting Resolutions to Institute, copies to Directors.
 - h. Solicit suggestions for Chapter Officers on behalf of Nominating Committee.
- 2. Region Chairmen (C)
 - a. _____
- 3. Institute Director (D)
 - a. _____

G. FEBRUARY

- 1. Chapter President (P)
 - a. Act on Chapter dues changes - due February 28.

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- b. Report by Nominating Committee to Chapter Board.
- d. Mail information to Institute on Chapter dues changes - due February 28.
- e. Institute sends information on number of delegates and Rules for Annual Meeting.
- f. Institute mails election ballots during February. Urge members to vote for Institute Officers and Directors.
- f. Inform members of resolutions being submitted to Institute for Conventions.

2. Region Chairmen (C)

- a. _____

3. Institute Director (D)

- a. _____

H. MARCH

1. Chapter President (P)

- a. Consider items for discussion at Institute Annual Convention Presidents' Meeting - due May 1.
- b. Appoint by Chapter Awards Committee.
- c. Progress report on Spring Membership Drive.
- d. Nominating Committee present report at Chapter meeting.
- e. Mail Chapter Ballots. Complete Chapter elections by mid-April.
- g. Certification Examinations - first Saturday in April.
- h. Urge members to vote for Chapter Officers and Directors.

2. Region Chairmen (C)

- a. _____

3. Institute Director (D)

- a. _____

I. APRIL

1. Chapter President (P)

- a. Discuss attendees to Institute Convention Presidents' Meeting.
- b. Discuss delegates to Institute Annual Convention.
- c. Report by Chapter Awards Committee.
- d. Report on Spring Membership Drive.
- e. Complete Chapter elections by mid-April.
- f. Incoming President appoint committee chairmen. Seek commitments that they will attend Region Conference.
- g. Send report of in-coming officers and committee chairmen to Institute and Institute Directors.

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- h. Directors notify Chapters of date and location of Incoming Presidents' Orientation.
 - i. Institute sends delegate cards for Annual Meeting to Chapters.
 - j. Urge members to contact Awards Committee with suggestions for Chapter Awards.
 - k. Urge members interested in Chapter committee work to contact Chapter President-elect.
- 2. Prepare submittals for Region Awards
 - 3. Region Chairmen (C)
 - a. _____
 - 4. Institute Director (D)
 - a. _____

J. MAY

- 1. Chapter President (P)
 - a. Confirm attendees to Convention Presidents' Meeting.
 - b. Confirm delegates to Institute Annual Convention.
 - c. Discuss Annual Convention Resolutions.
 - d. Confirm group transportation to Institute Annual Convention.
 - e. Consider nominating a Chapter member for Southwest Region Institute Director, if applicable.
 - f. Confirm Chapter Awards for Chapter Annual Meeting.
 - g. Mail list of Convention delegates to Institute - due May 15.
 - h. President-Elect attend In-coming Presidents' Orientation.
 - i. Mail Region Award Nominations to Directors.
 - k. Urge attendance at Annual Convention.
 - i. Submit nominations for region awards.
- 2. Region Chairmen (C)
 - a. _____
- 3. Institute Director (D)
 - a. Confirm attendees to Convention Presidents' Meeting.
 - b. Confirm delegates to Institute Annual Convention.
 - c. Send proposed revisions to Region Operating Guide to Chapter Presidents.

K. JUNE

- 1. Chapter President (P)

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- a. Secretary distribute Annual Convention delegate cards to Chapter Delegates.
 - b. Transfer Chapter leadership to new Board at Joint Board Meeting.
 - c. Appoint committee to audit Chapter finances.
 - d. Discuss Chapter goals, programs, and budget for new year.
 - e. Contact and confirm new committee members; discuss Chapter goals, programs, and budget for new year.
 - f. Prepare Secretary's and Treasurer's Annual Reports for Annual Chapter Meeting in June.
 - g. Solicit changes to Region Operating Guide and Region Business Meeting agenda items for fall Conference.
 - i. Attend Annual Convention.
 - j. At Convention Region Caucus, nominate Chapter member for Institute Director, if applicable.
2. Region Chairmen (C)
- a. Attend Annual Convention.
 - b. _____
3. Institute Director (D)
- a. Attend Annual Convention.
 - b. _____