



Chapter Annual Checklist

Overview

The purpose of the chapter annual checklist is to provide an outline of ongoing chapter leader action items. This checklist is only a sample and chapter leaders should add additional action items specific to the chapter.

Questions? Contact HIMSS chapters staff or chapters@himss.org.

Quick Links

- [Accountability Reporting](#)
- [Chapter request form](#) (collaboration, speaker, financial support)
- [Chapter Leader Resource Area](#)
- [Email portal](#)

Ongoing

- Let HIMSS staff know about your events. Send details to chapters@himss.org to post on the HIMSS calendar of events.
- Submit chapter board changes throughout the year to HIMSS staff or chapters@himss.org
- Submit [chapter request form](#) for collaboration approval, speaker assistance, or financial support
- Include chapters@himss.org on all mass email distributions

Q1 (July – September)

- Submit [Chapter Board List](#) for Accountability Reporting | **Due July 1**
- Update [chapter email address](#) forwarding and board group email (password set my current owner) – this will be done by HIMSS staff if included in the Chapter Board List submission
- Update chapter banking information and ensure a minimum of two signatories
- Update web and social presence
- Chapter leaders review [governance material](#), bylaws, role descriptions, and specific chapter processes

- New chapter leaders utilize [Chapter Leader Development](#) resources (review handbooks/onboarding document and attend Chapter Leadership Academy)
- Host board kick-off meeting and/or [leadership retreat](#)
- Notify membership and stakeholders of new chapter board
- Submit [Administrative Report](#) for Accountability Reporting | **Due August 1** (discuss with chapter board awards submission through report)
- Attend Chapter Leader Exchange

Q2 (October – December)

- US chapters submit [form 990](#) to IRS | **Due November 15**
- Submit [Financials](#) for Accountability Reporting | **Due November 1**

Q3 (January – March)

- Board meets to discuss election planning and develop timeline

Q4 (April – June)

- Adhere to chapter's [election](#) timeline for open call for nominations, election processes, and announcement of winners/non-winners
- Submit new FY board list to HIMSS staff immediately following election
- Officer transition and potentially host officer transition meeting