



Chapter Compliance Checklist

Visit the [CLRP > Compliance](#) for required forms and templates

August 1

_____ Board Slate for Following Fiscal Year

December 1

_____ Volunteer Leader Agreement form will be emailed to all Board members from your Chapter Operations team member in September.

_____ Budget

_____ 18-24 month Chapter Calendar of Events

_____ Current & Updated Policy Manual

_____ Paid Chapter Administrator (if applicable)

Required Annually

_____ Annual Evaluation

_____ Proof of Insurance

Required only when there is a new or renewing contract

_____ Business License

_____ Chapter Operations Form

_____ Copy of Contract/Business Service Agreement

_____ Submit the Chapter Representative for the Regional Council

Local Tax Deadline

_____ File Annual Tax Return

Additional Compliance Requirements

- _____ Regular Members Meetings (notice at least 20 days prior to meeting) - *Chapter Bylaws Article V, Sections 1 and 4)*
- _____ Minimum of four educational events annually - *Chapter Policy Manual, Article VII, Section 1*
- _____ Officers – a minimum of 5 officers filling 7 minimum roles – *Chapter Bylaws Article VI, Section 1*
- _____ Board retreats – one annual retreat is required (with MPI-Verified Facilitator) – *Chapter Policy Manual Article IV, Section 2*
- _____ Paid administrators must meet all requirements - *Chapter Policy Manual Article V, Section 7*
- _____ Adhere to brand standards and trademarks - *Chapter Policy Manual Article VIII, Section 1*
- _____ 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.