

Executive/Committee Chair Position Calendar

Start	End	Task	Responsible	Comments	Committee Affected
Jan-01		Transfer money between checking and investment accounts to maximize dividend income.	Treasurer	On-going	
Jan-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	All
Jan-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	All
Jan-01		December Financial Statements	Treasurer		
Jan-05		In consultation with the President and the Finance Advisory Committee, develop a proposed budget for the next fiscal year.	Treasurer		Finance Advisory
Jan-05		Prepare for the Winter Executive Meeting. Include previous year audited final financial statements, latest YTD financial statements, list of institutional members, list of gold plan members, committee liaison information, proposed budget for next fiscal year, and recommendations and/or changes in Financial Guidelines	Treasurer		

		as proposed by the Finance Advisory Committee.			
Jan-07		Submit Annual Conference and Exposition program proposals, include passport programs and diversity networks	New Pros and E&DI		
Jan-08		Make travel arrangements for Winter Exec Meeting	All		
Jan-08		Check in with Corporate Relations about Corporate Membership updates	Technology Coord		Corp Relations
Jan-08		Work with the Finance Advisory Committee to ensure completion of the audit report.	Treasurer		Finance Advisory
Jan-08		Time & Place <i>Waves</i> article with bid deadline (include transition dates as part of bid)	Vice President		Time and Place
Jan-08		<i>Waves</i> article announcing committee request process for following year	Vice President		
Jan-08		<i>Waves</i> article requesting any By-Law changes	Vice President		By-Laws
Jan-10		Advertise for Annual Conference and Exposition Awards	President		New Pros E&DA
Jan-10		Award Joan F Mortell WTI Award for New Pro			WTI New Pros
Jan-15		Contact committee chairs to encourage them to present at Annual Conference and Exposition; assist with program proposals if needed (non-SLD committees)	All		All
Jan-15		Send out RW Gang, Charles L Miller, and Volunteer of the Year email	Pres Elect		
Jan-15		Send out Diversity & Affirmative Action e-mail for individual and institutional awards	Pres Elect		Diversity & Affirm. Action
Jan-15		Send out call for Nominations for Exec Board	Recent Past President		Nominations
Jan-29		Send out draft agenda for winter Exec meeting	President	3 weeks before meeting	

Jan-29		Send rosters to committee chairs to confirm membership	Vice President	3 weeks before meeting	All
Jan-30		All receipts due within 30 days of event/mtg	All		All
Jan-30		Time & Place bids DUE	Vice President		T&P
Jan-30		WACUHO Committee requests for following year available online			
Feb-01		Prepare for Winter Exec Meeting (reports from chairs, follow up items from previous meeting, etc.)	All		
Feb-01		Make checks/deposits on a daily basis.	Treasurer	On-going	All
Feb-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Feb-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	All
Feb-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	All
Feb-01		January Financial Statements	Treasurer		
Feb-08		Submit to President Elect any/all proposed changes to the Leadership Manual.	All		
Feb-08		Prepare articles for the newsletter.	All		
Feb-08		Prepare a proposed budget that will be presented to the Exec committee at the Winter Exec meeting and during the business meeting of the Annual Conference and Exposition for final approval.	Treasurer		
Feb-08		Time & Place committee ranks all bids received	Vice President		T&P

Feb-13		Review all Time & Place bids and select winning bid (include transition dates in bids)	All		T&P
Feb-14		First round of WACUHO committee requests due (for review at Exec Spring meeting--bring copies for Exec to review)	Vice President		
Feb-14		Proposed by-law changes due	Vice President		
Feb-14		Confirm current year committee membership for Awards & Recognition committee	Vice President		Awards & Recognition
Feb-16		Select Annual Conference and Exposition Award recipients	President		New Pros E&DA
Feb-17		Exec Board nominations due	Pres Elect		Nominations
Feb-21		Review & finalize committee/chair requests at Exec Spring meeting	Vice President		
Feb-21		Review & finalize proposed by-law changes at Exec Spring meeting	Vice President		
Feb-22	Feb-24	Winter Exec Meeting (discuss Spirit of WACUHO award)	All		Exec
Feb-27		Type draft of minutes and distribute to Execs; send to webmaster for online posting	Secretary		
Feb-28		All receipts due within 30 days of event/mtg	All		All
Feb-28		Make travel plans for Annual Conference and Exposition meeting	All		
Mar-01		Prepare for Annual Conf Business Meeting (reports from chairs, follow up items from previous meeting, etc.)/Send soft copy to Secretary for Business meeting packet	All		All
Mar-01		RW Gang, Charles L. Miller, and Volunteer of the Year nominations due	Pres Elect	Depends on timing of Annual Conference and Exposition	Corp Relations
Mar-01		Early Bird Deadline for Annual Conference and Exposition	President		Annual

					Conference
Mar-01		Prepare Annual Conference and Exposition Business Meeting packets (enough copies for all voting members); include agenda, Exec reports, proposed budget, voting placards, prior year minutes, proposed by-law changes, etc.	Secretary		
Mar-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Mar-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Mar-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Mar-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	
Mar-01		February Financial Statements	Treasurer		
Mar-01		Prepare and present for the Annual Meeting: Budget Summary (prior year, YTD), findings from audit report, list of all institutional and corporate members, proposed budget, and any recommendations by the Finance Advisory Committee.	Treasurer		
Mar-02		Order plaques after Winter Exec meeting	Pres Elect		Awards & Recognition
Mar-08		Select Charles L Miller/RW Gang recipients	Pres Elect	Depends on timing of Annual Conf	Corp Relations
Mar-08		Select DAA Institutional/Individual award recipients		Depends on timing of Annual Conf	Diversity & Affirm. Action
Mar-10		Letter to Annual Conference and Exposition newcomers	President		

Mar-15		Advertise for ACUHO-I Conference Award	Pres Elect		New Pros
Mar-15		Exec Board nominee bios due	Pres Elect	Depends on timing of Annual Conf	Nominations
Mar-15		Prepare logistics for AC committee reception	President		
Mar-15		Take detailed minutes during Annual Conference and Exposition Business Meeting	Secretary		
Mar-15		Prepare member roster for Nominations chair/roll call	Secretary		
Mar-15		Prepare and present financial information at the new chair and executive committee member orientation at the Annual Conference and Exposition.	Treasurer		
Mar-15		Announce winning bid at Business Meeting	Vice President		
Mar-30		All receipts due within 30 days of event/mtg	All		All
Apr-01		Create Exec candidate bio boards	Pres Elect		Nominations
Apr-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Apr-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Apr-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Apr-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	
Apr-01		March Financial Statements	Treasurer		
Apr-07		Reimburse AC for conference awards	Treasurer		New Pros E&DA
Apr-08		Prepare articles for the newsletter.	All		

Apr-08		Select ACUHO-I conference award recipient			New Pros
Apr-11		Register for ACUHO-I Annual Conference and Exposition	All		
Apr-30		Make travel plans for June Transition meeting	All		
Apr-30		All receipts due within 30 days of event/mtg	All		All
May-01		Early Bird Deadline for ACUHO-I conference	All	Award recipient New Pros	
May-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
May-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
May-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
May-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	
May-01		April Financial Statements	Treasurer		
May-07		Encourage committee chairs to submit End of Year report to Vice President	All		
May-08		Prepare End of Year Report	All		
May-08		Contact WACUHO webmaster to make intros	Technology Coord		
May-10		Anticipate ordering food for ACUHO-I reception	Pres Elect		
May-11		Audit survey monkey service	Technology Coord		
May-15		Prepare for Transition Executive Meeting. Include latest YTD financial statements, list of institutional members, list of	Treasurer		

		gold plan members, and committee liaison information.			
May-24		Meet with SLD Planning committee to determine theme	MALs		
May-25		Prepare transition topics for incoming counterpart on Exec	All		
May-26		Compile "Pearls of Wisdom" for incoming Exec	All		
May-30		All receipts due within 30 days of event/mtg	All		All
Jun-01		Exec Transition mtg	All		Determine mtg dates/locations for year
Jun-01		Set Newsletter dates at Transition mtg	Newsletter Editor		
Jun-01		Check w/future AC chairs to book hotel rooms for next Transition mtg	Pres Elect		
Jun-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Jun-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Jun-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Jun-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	
Jun-01		May Financial Statements	Treasurer		
Jun-01		Anticipate ACUHO-I Regional Reception Invoice	Treasurer		
Jun-01		NHTI Award (\$1000)			
Jun-01		ACUHO-I Annual Conference and Exposition Award (\$1000)			
Jun-01		Transition new Execs	All		

Jun-07		Arrange for updates to Schwab accounts.	Treasurer		
Jun-10		Contact Annual Conference and Exposition, Host and Exhibits Chairs for conference website/online registration	Technology Coord		
Jun-13		Send all documents, tapes to Historian	Secretary		
Jun-15		Adjust WACUHO e-mail aliases for incoming Exec	Technology Coord		
Jun-15		Contact Committee Chairs regarding the use of technology (websites, e-mail announcements, etc.)	Technology Coord		
Jun-15		All receipts due for year-end close (budget)	Treasurer		
Jun-18		Make contact with liaison committee chairs	All		
Jun-18		Meet with the SLD Planning Committee, determine future meetings, etc.	MALs/Island SLD liaison		
Jun-22		Update membership rates on web	Technology Coord		
Jun-23		Send draft of minutes/post to web	Secretary		
Jun-24		Renew Survey Monkey service	Treasurer		
Jun-30		All receipts due within 30 days of event/mtg	All		All
Jul-01		Update online membership (delete invalid accounts)	Technology Coord		
Jul-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Jul-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Jul-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Jul-01		Provide membership lists, forms, reserve requests, corporate relations funding, and	Treasurer	On-going	

		general information upon request.			
Jul-01		June / End of Year Financial Statements	Treasurer		
Jul-01		Mail out information packets to all committee chairs and executive committee members. Include: budget form, donations, check request, and deposit form.	Treasurer		
Jul-01		Send updated WACUHO committee rosters to chairs & Exec	Vice President		
Jul-05		Mail Invoices and renewal information to SHOs regarding membership	Treasurer		
Jul-10		SLD Committee Meeting (remember to plan for quarters vs. semester schools)	MALs		
Jul-15		Work with Annual Conference and Exposition Chairs to create basic Annual Conference and Exposition website	Technology Coord		
Jul-15		Contact SLD/WTI chairs about using online registration	Technology Coord		
Jul-30		All receipts due within 30 days of event/mtg	All		All
Aug-01		Contact WACUHO committees to which you are liaison (have committee chairs update websites, etc.)	All		
Aug-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Aug-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Aug-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Aug-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	

Aug-01		July Financial Statements	Treasurer		
Aug-01		File "Domestic Nonprofit Corporation" statement with Secretary of State	Treasurer		
Aug-01		Send updated WACUHO committee rosters to chairs & Exec	Vice President		
Aug-08		Exec mtg host for Fall meeting should send email with logistics (travel, accommodations, etc.)			
Aug-09		Create & test SLD/WTI online registration	Technology Coord		
Aug-10		SLD Committee meeting	MALs		
Aug-15		All SLD locations/dates should be finalized	MALs/SLD liaison		
Aug-30		All receipts due within 30 days of event/mtg	All		All
Sep-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Sep-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Sep-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Sep-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	
Sep-01		August Financial Statements	Treasurer		
Sep-01		Send updated WACUHO committee rosters to chairs & Exec	Vice President		
Sep-08		Prepare article for newsletter (SLDs, award availability, committee membership, Pres letter refer to goals for year)	All		
Sep-08		Make travel arrangements for Fall Exec meeting	All		

Sep-08		SLD Committee Meeting	MALs		
Sep-08		Contact all institutions (via SHO e-mail) to update membership	Technology Coord		
Sep-08		Reminder notices to SHOs who have not yet re-affiliated.	Treasurer		
Sep-10		Work with Treasurer to update Institutional membership years	Technology Coord		
Sep-13		Send draft agenda of Fall mtg	President		
Sep-30		All receipts due within 30 days of event/mtg	All		All
Oct-01		Contact all individuals (via e-mail) to update membership information	Technology Coord		
Oct-01		Work with technology consultant on any necessary changes to SLD online registration	Technology Coord		
Oct-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Oct-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Oct-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Oct-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	
Oct-01		September Financial Statements	Treasurer		
Oct-01		Advertise WTI Award			WTI
Oct-08		Prepare for Fall Exec Meeting (reports from chairs, follow up items from previous meeting, etc.)	All		
Oct-08		Annual Conference and Exposition budget DUE to Exec for review	President		

Oct-08		Renew Insurance Policy. (Expires Dec)	Treasurer		
Oct-08		File Federal Tax form 990 and State Tax form 199 for previous year fiscal activities	Treasurer		
Oct-08		Prepare for the Fall Executive Meeting. Include previous year final financial statements, latest YTD financial statements, list of institutional members, list of gold plan members, and committee liaison information.	Treasurer		
Oct-08		Prepare for an audit of previous year's activities.	Treasurer		
Oct-10		SLD Committee meeting	MALs		
Oct-12		Contact schools who have not paid dues (use SLD registration as reason for calling)	MALs		
Oct-15		Send updated WACUHO committee rosters to chairs & Exec (review at Fall Exec meeting as needed) after checking to verify that all chairs and committee members belong to member institutions.	Vice President		
Oct-24	Nov-18	SLDs (tend to occur from last week of Oct - first weeks of Nov)	All		
Oct-24	Nov-18	SLD committee appreciation meal (\$10/committee member up to \$200)	MALs		
Oct-30		All receipts due within 30 days of event/mtg	All		All
Nov-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Nov-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	
Nov-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Nov-01		Provide membership lists, forms, reserve requests,	Treasurer	On-going	

		corporate relations funding, and general information upon request.			
Nov-01		November Financial Statements	Treasurer		
Nov-01		Select WTI award recipient			New Pros
Nov-08		Reminder notices to SHOs who have not yet re-affiliated.	Treasurer		
Nov-08		Conduct audit of previous fiscal year activities with Finance Advisory Committee	Treasurer		
Nov-08		Renew Bond. (Expires 12/12/06)	Treasurer		
Nov-10		Begin preparing for Annual Conference and Exposition online registration	Technology Coord		
Nov-13		Exec mtg host for Winter meeting should send email with logistics (travel, accommodations, etc.)		3 day meeting	
Nov-15		Confirm with the CRC chair(s) that corporate relations information has been sent to all committee chairs and executive committee members.	Treasurer		
Nov-15		Confirm with the CRC chair(s) that corporate relations renewal information has been sent.	Treasurer		
Nov-15		Send Time & Place teaser postcard to all eligible host institutions	Vice President		
Nov-28		Send Time & Place letter with bid instructions to all eligible host institutions	Vice President		
Nov-30		All receipts due within 30 days of event/mtg	All		All
Dec-01	Feb-28	Attend SLD Wrap-up Meeting; assist chair with finding next chair & soliciting host schools	MALs		SLDs
Dec-01		Make checks/deposits on a daily basis.	Treasurer	On-going	
Dec-01		Transfer money between checking and value advantage accounts to maximize dividend income.	Treasurer	On-going	

Dec-01		Provide Committee Chairs financial support: approval of budgets, YTD summaries upon request, assistance in closing budgets.	Treasurer	On-going	
Dec-01		Provide membership lists, forms, reserve requests, corporate relations funding, and general information upon request.	Treasurer	On-going	
Dec-01		November Financial Statements	Treasurer		
Dec-01		Final call to SHOs who have not yet re-affiliated.	Treasurer		
Dec-01		Request proposed budget allocations for the next fiscal year from all committee chairs and executive committee members. Requests due by January.	Treasurer		
Dec-01		Work with the Finance Advisory Committee to ensure completion of the audit report.	Treasurer		
Dec-08		Prepare article for newsletter (Bylaw changes, Charles L. Miller/RW Gang awards, SLD reviews, committee membership for next year, Time & Place, Nominations, etc.)	All		Awards & Rec Time & Place Nominations SLDs By-Laws Corp Relations
Dec-15		Early Bird Deadline for WTI registration			WTI
Dec-30		All receipts due within 30 days of event/mtg	All		All