ANNUAL CALENDAR OF UNIT ACTIVITIES (1/1-12/31)

This planning tool is designed to help Units stay organized, proactive, and aligned with key expectations from Headquarters throughout the year. It outlines important deadlines, recommended activities, and suggested timelines for tasks that support strong governance, member engagement, and overall Unit success.

Quarter 1

JANUARY	FEBRUARY	MARCH
☐ Review Unit Leader Success Snapshot	☐ Review Unit Leader Success Snapshot	☐ Review Unit Leader Success Snapshot
☐ Unit Board Meeting	☐ Unit Board Meeting	☐ Unit Board Meeting
☐ Update Success Metrics	☐ Update Success Metrics	☐ Update Success Metrics
☐ Review/Submit Web Request Update for Website	☐ Review/Submit Web Request Update for Website	☐ Review/Submit Web Request Update for Website
☐ Welcome new members	☐ Welcome new members	☐ Welcome new members
☐ Communicate to members expiring	☐ Communicate to members expiring	☐ Communicate to members expiring
☐ Post on/Monitor Unit CECommunity	☐ Post on/Monitor Unit CECommunity	☐ Post on/Monitor Unit CECommunity
☐ Attend Q1 Unit Leader Success Gathering	☐ Host Unit Member Social Gathering	☐ CEC Annual Convention
☐ New Board Member Orientations		☐ Receive membership dues from CEC HQ
☐ Board Terms Begin		
☐ Submit Unit Leader Update Form		

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Quarter 2

APRIL	MAY	JUNE
☐ Review Unit Leader Success Snapshot	☐ Review Unit Leader Success Snapshot	☐ Review Unit Leader Success Snapshot
☐ Unit Board Meeting	☐ Unit Board Meeting	☐ Unit Board Meeting
☐ Update Success Metrics	☐ Update Success Metrics	☐ Update Success Metrics
☐ Review/Submit Web Request Update for Website	☐ Review/Submit Web Request Update for Website	☐ Review/Submit Web Request Update for Website
☐ Welcome new members	☐ Welcome new members	☐ Welcome new members
☐ Communicate to members expiring	☐ Communicate to members expiring	☐ Communicate to members expiring
☐ Post on/Monitor Unit CECommunity	☐ Post on/Monitor Unit CECommunity	☐ Post on/Monitor Unit CECommunity
☐ Attend Q2 Unit Leader Success Gathering	☐ May 15 – File Form 990 (N, EZ) *for U.S. Units*	☐ Unit Annual Business Meeting with Members
	☐ Host Unit Member Social Gathering	☐ CEC Annual Convention Registration Opens
		☐ Review Governing Documents
		☐ June 30 – File Form T3010 *for Canadian Units*

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Quarter 3

JULY	AUGUST	SEPTEMBER
☐ Review Unit Leader Success Snapshot	☐ Review Unit Leader Success Snapshot	☐ Review Unit Leader Success Snapshot
☐ Unit Board Meeting	☐ Unit Board Meeting	☐ Unit Board Meeting
☐ Update Success Metrics	☐ Update Success Metrics	☐ Update Success Metrics
☐ Review/Submit Web Request Update for Website	☐ Review/Submit Web Request Update for Website	☐ Review/Submit Web Request Update for Website
☐ Welcome new members	☐ Welcome new members	☐ Welcome new members
☐ Communicate to members expiring	☐ Communicate to members expiring	☐ Communicate to members expiring
☐ Post on/Monitor Unit CECommunity	☐ Post on/Monitor Unit CECommunity	☐ Post on/Monitor Unit CECommunity
☐ Attend Q3 Unit Leader Success Gathering	☐ Host Unit Member Social Gathering	☐ Board Elections Process
☐ Special Education Legislative Summit (SELS)		
☐ Leadership Institute		

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Quarter 4

OCTOBER	NOVEMBER	DECEMBER
☐ Review Unit Leader Success Snapshot	☐ Review Unit Leader Success Snapshot	☐ Review Unit Leader Success Snapshot
☐ Unit Board Meeting	☐ Unit Board Meeting	☐ Unit Board Meeting
☐ Update Success Metrics	☐ Update Success Metrics	☐ Update Success Metrics
☐ Review/Submit Web Request Update for Website	☐ Review/Submit Web Request Update for Website	☐ Review/Submit Web Request Update for Website
☐ Welcome new members	☐ Welcome new members	☐ Welcome new members
☐ Communicate to members expiring	☐ Communicate to members expiring	☐ Communicate to members expiring
☐ Post on/Monitor Unit CECommunity	☐ Post on/Monitor Unit CECommunity	☐ Post on/Monitor Unit CECommunity
☐ Attend Q4 Unit Leader Success Gathering	☐ Begin drafting next fiscal year Work Plan and Operating budget	☐ Unit Annual Business Meeting with Members
☐ Submit Assurance Form	☐ Board Elections Process	☐ Board Member Terms End
☐ Begin discussions for next year's Work Plan and Operating Budget	☐ Host Unit Member Social Gathering	☐ Board Elections Process
☐ Board Elections Process		

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Additional Considerations

- State/Province Report Filings
    - Check with the state/province agency responsible for nonprofit corporation or charity compliance. There is often a requirement to maintain legal compliance to submit a brief report. Reporting frequency varies by state/province.

- Promote CEC Convention
    - Actively promote the CEC Convention throughout the year by sharing key updates (such as dates, location, calls for proposals, registration deadlines, and featured sessions, etc.) via Unit newsletters, social media, meetings, and direct member communications to encourage awareness, engagement, and attendance.