# ANNUAL CALENDAR OF UNIT ACTIVITIES (7/1-6/30)

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 | ☐ Begin discussions for next year's (starting in July) Work Plan and Budget | ☐ CEC Annual Convention |
| | ☐ Host Unit Member Social Gathering | ☐ Receive membership dues from CEC |
| | | ☐ Begin drafting next fiscal year Work Plan and operating budget |
| | | ☐ Board Elections Process |

*Last Updated – December 2025*

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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 | ☐ Finalize next year's Work Plan and operating budget | ☐ Unit Annual Business Meeting with Members |
| ☐ Review/update draft Work Plan and operating budget | ☐ Host Unit Member Social Gathering | ☐ CEC Annual Convention Registration Opens |
| ☐ Board Elections Process | ☐ Board Elections Process | ☐ Board Member Terms End |
| | | ☐ Board Elections Process |

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# ANNUAL CALENDAR OF UNIT ACTIVITIES (7/1-6/30)

**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 | ☐ Review Governing Documents |
| ☐ Special Education Legislative Summit (SELS) | | |
| ☐ Leadership Institute | | |
| ☐ Board Terms Begin | | |
| ☐ New Board Member Orientations | | |
| ☐ Submit Unit Leader Update Form | | |

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# ANNUAL CALENDAR OF UNIT ACTIVITIES (7/1-6/30)

**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 | ☐ Nov. 15 – File Form 990 (N, EZ) *for U.S. Units* | ☐ Dec. 30 – File Form T3010 *for Canadian Units* |
| ☐ Submit Assurance Form | ☐ Host Unit Member Social Gathering | |

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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.