UNITS TASKS-AT-A-GLANCE

UNIT TASKS AT-A-GLANCE

This tool is designed to support Unit leaders in planning, organizing, and fulfilling key responsibilities throughout the year. It outlines essential tasks, explains their purpose and importance to both your Unit and CEC Headquarters, and provides helpful details such as timing, frequency, and relevant links or notes.

Whether you're a new or seasoned leader, this resource is here to guide your efforts, ensure alignment with CEC's goals, and help your Unit thrive in serving the special education community.

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GENERAL ADMIN

TASK	PURPOSE/IMPORTANCE	FREQUENCY/DATE	NOTES/LINKS
Unit Leader Update Form	***For Units:*** To ensure your Unit has continued contact with Headquarters for updates, news, and other happenings for your Unit's overall success. ***For Headquarters:*** To ensure Headquarters has up-to-date contacts for each Unit.	Within 30 days of a leadership transition	Unit Leader Update Form
Submit Assurance Form	***For Units:*** Assurance Form requests the 990 or 1120 Form to receive the membership reimbursement check distributed by CEC. This form also requires confirmation of the name and address of the person to which the check should be mailed. ***For Headquarters:*** Assurance Forms allow Headquarters to review and understand the health	Annually in October	Assurance Form Counts toward Unit Engagement for "Active" Status

	of each Unit as well as the overall Unit network by reviewing 990s, and they provide confirmation of the address of the person to which the rebate check should be mailed.		
Review/Update Website	***For Units:*** Your website is a powerful tool to continue keeping your members engaged and active. It is also typically one of the first impressions that new/prospective members have of your Unit – if it's updated and active, the more members will be willing to join and engage! ***For Headquarters:*** Your Unit website and perceived perception by members reflects on the larger organization as well. Headquarters will support updating your website to ensure a good perception and reputation of all CEC.	Quarterly	Component Web Request Form
Receive Membership Dues from CEC HQ	***For Units:*** Units receive rebate dues from Headquarters twice per year, equally $10/member, minus processing fees.	March	The more a Unit can support in the recruitment and retention of members in their state/province, the more

	This funding helps provide Units with funding to use at the Unit's discretion for activities to engage members. ***For Headquarters:*** Membership rebates are an important way for CEC Headquarters to support the work of Units by providing them with essential financial resources to engage members, host events, and advance CEC's mission at the local level. Rebates also demonstrate the value of membership by reinvesting dues back into the community, helping members see the direct impact of their support. In addition, they reinforce a strong partnership between Units and Headquarters, encouraging accountability through reporting and active participation.		funding will come to support engagement activities. Rebates are based on the number of members within a state/province on December 31.
Access Membership Lists	***For Units:*** Units have access to download an up-to-date membership list of its current members to use as a mechanism to personally welcome new members, add these new members to mailing/newsletter lists, and to	Monthly	Membership List Access Link

	understand your member demographic for tailored professional development and other activities. ***For Headquarters:*** Unit membership lists gives Headquarters an understanding of the demographic of your state/province as well as the number of members to provide further guidance to support your Unit.		

UNITS TASKS-AT-A-GLANCE

MAINTAINING A NONPROFIT STATUS

TASK	PURPOSE/IMPORTANCE	FREQUENCY/DATE	NOTES/LINKS
Submit Information Returns: • U.S.: 990 Form (990-N, 990-EZ, etc.) • CA: T3010	***For Units:*** To maintain a Unit's good standing as nonprofit entities and to ensure compliance with IRS (U.S.) and CRA (CA) regulations. Timely submission helps protect the Unit's tax-exempt status and supports financial transparency and accountability. ***For Headquarters:*** To ensure that Units are in compliance with IRS and CRA regulations and protect the organization's overall operating perception. Annual 990 and T3010 submissions also promote financial transparency and accountability across the network, enabling Headquarters to verify that Units are	• U.S. ○ 15th day of the fifth month after fiscal year ends ○ Typically either May 15 or Nov 15 • CA ○ Last day of the sixth month after fiscal year ends ○ Typically June 30 or Dec 31	U.S. Information about Form 990 Revenue <$50,000 (990-N, postcard) Revenue <$200,000 (990-EZ) May be subject to Unrelated Business Income Tax (UBIT) 990 must be made available upon request CA Information about Form T3010 *CEC will not relinquish dues without proof of filing

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	operating in good faith and meeting basic governance requirements.		
Add Information Return (Form 990 or Form T3010) to Website	***For Units:*** Including the public version of the Form 990 and Form T3010 on your website helps build trust and transparency with current and future members, as well as others who may be looking to interact with the Unit. ***For Headquarters:*** Strong Unit websites, with trust and transparency, reflect positively for the entire organization.	As soon as the public version of your Form 990 or Form T3010 is available	Component Web Request Form
Save Governing Documents in Safe Location – Send Copies to CEC HQ	***For Units:*** Saving your governing documents in a secure and accessible location ensures leadership continuity and operational consistency. Sharing copies with CEC Headquarters helps safeguard your Unit's history and compliance documentation, especially during leadership transitions. ***For Headquarters:***	One time, or as documents are reviewed/updated	Documents include: - Articles of Incorporation - Bylaws - Policy Manual - Operations Manual

	When Units maintain and share updated governing documents, CEC can provide better support, ensure alignment with organizational standards, and help protect the integrity of the broader association in times of transition or need.		
Insurance	***For Units:*** Maintaining appropriate insurance coverage, such as general liability or event insurance, protects your Unit, leaders, and volunteers from unexpected risks. It ensures that you can continue serving your members and community confidently and responsibly. ***For Headquarters:*** When Units carry the necessary insurance, it reduces organizational risk and demonstrates responsible stewardship. It also strengthens CEC's ability to advocate for and support Units with confidence across a variety of programming and engagement opportunities.	Review annually	Examples: - Directors and Officers Insurance - General Liability Insurance - Event Cancellation Insurance

Signing Conflict of Interest Form	***For Units:*** Having all board members sign a Conflict of Interest form each year promotes transparency, ethical decision-making, and accountability. It protects the integrity of your Unit's leadership and builds trust with members, donors, and partners. ***For Headquarters:*** When Unit leaders complete Conflict of Interest forms, it reinforces CEC's commitment to ethical governance across all levels of the organization and ensures alignment with best practices in nonprofit management.	Annually	

UNITS TASKS-AT-A-GLANCE

UNIT LEADER SUCCESS SERIES

TASK	PURPOSE/IMPORTANCE	FREQUENCY/DATE	NOTES/LINKS
Attend Quarterly Unit Leader Success Gatherings (ULSG)	***For Units:*** Participate live in the Quarterly Gathering to earn a point towards your Unit's engagement to maintain "Active" status. These gatherings are also crucial to receive updates from Headquarters, look forward to the next quarter's happenings, connect and share with other Units, and more. ***For Headquarters:*** These gatherings assist Headquarters by creating a two-way street communication pipeline between Headquarters and Units by sharing updates, looking forward to the next quarter's happenings, and connecting	Quarterly	Unit Leadership CECommunity Counts toward Unit Engagement for "Active" Status

	with Unit leaders to continue building relationships and a feedback loop.		
Review Unit Leader Success Snapshots (ULSS)	***For Units:*** Receive and review a snapshot of the month's happenings. Act on tasks assigned that month from Headquarters or share specific information with your members. This Snapshot builds an additional avenue of communication with Headquarters. ***For Headquarters:*** The Snapshot provides an additional avenue of communication and connection with Units every month to share important information and updates as well as critical tasks to be completed from Units or Headquarters.	Monthly	Previous Monthly Snapshots found in Unit Leader CECommunity Discussion Forum
Log in Regularly to Unit Leadership CECommunity	***For Units:*** To stay connected with CEC resources, receive important updates, and collaborate with other Unit leaders. Regular engagement helps Units stay informed, share best	Biweekly	Unit Leadership CECommunity

	practices, and strengthen their local leadership. ***For Headquarters:*** To ensure timely communication, access to resources, and active engagement with national initiatives. Regular participation helps strengthen collaboration, keeps Unit leaders informed, and supports consistent alignment with CEC's goals.		

UNITS TASKS-AT-A-GLANCE

CEC EVENTS

TASK	PURPOSE/IMPORTANCE	FREQUENCY/DATE	NOTES/LINKS
Register and Attend Special Education Legislative Summit (SELS)	***For Units:*** Participation gives Units a powerful platform to advocate for the needs of their students, educators, and communities at the federal level. By meeting with lawmakers and sharing local stories and challenges, Unit representatives can influence national policies that directly impact their schools and programs. Participation also helps build leadership skills, strengthen the	Annually in July	Special Education Legislative Summit (SELS) Website Counts toward Unit Engagement for "Active" Status

	Unit's visibility, and demonstrate a commitment to shaping the future of special education—both locally and nationally. ***For Headquarters:*** Unit involvement strengthens CEC's collective advocacy voice at the national level. When Unit leaders and members engage directly with policymakers, they help elevate the real-world experiences and needs of special education professionals and students from across the country. This grassroots presence not only reinforces CEC's policy priorities but also demonstrates the power and unity of the organization's membership, helping to advance meaningful changes in federal special education policy.		
Register and Attend Leadership Institute (LI)	***For Units:*** Participation offers a valuable opportunity for current and emerging leaders to build skills, gain new ideas, and connect with peers from across the country. Through focused training	Annually in July	Leadership Institute (LI) Website Counts toward Unit Engagement for "Active" Status

	and collaborative sessions, Unit leaders leave better equipped to strengthen their local efforts, grow membership, and align with CEC's mission. Participation in LI also fosters a sense of community, supports leadership development, and helps ensure the long-term success and sustainability of the Unit. ***For Headquarters:*** It is important for CEC Headquarters that Units participate in the Leadership Institute (LI) because it helps build strong, informed, and connected volunteer leaders who are equipped to lead their Units effectively. LI provides training, networking, and strategic planning opportunities that align Unit goals with CEC's broader mission. Active participation strengthens consistency and communication across the organization, fosters collaboration among leaders nationwide, and ensures that Units are well-supported and positioned to contribute		

	meaningfully to CEC's growth and impact.		
Register and Attend Annual Convention	***For Units:*** By attending, Unit leaders and members gain access to the latest research, resources, and practices in the field of special education, which they can bring back to strengthen their local programs. It also allows Units to connect with one another, share successes, and be recognized for their contributions to the CEC community. Participation reinforces the Unit's presence within the broader organization and helps inspire continued engagement and leadership at the local level. ***For Headquarters:*** Unit presence fosters a strong, unified organizational community and reinforces the connection between local leaders and the national mission. When Units attend, they contribute to the exchange of ideas, share their successes, and represent the diverse voices of special	Annually in March	Annual Convention Website Counts toward Unit Engagement for "Active" Status

	education professionals across regions. Their participation also supports leadership development, increases engagement with national initiatives, and helps Headquarters better understand and respond to the needs and priorities of members across the U.S. and Canada.		