Chapter Compliance Document Checklist

August 1

___ Board Slate for Following Fiscal Year
Template available: CLRP > Compliance > August 1 Compliance

December 1

___ Volunteer Leader Agreement – all Board members must complete required training prior to signing. Chapter Leaders will sign form electronically (sent by MPI Global).

___ Business Plan

___ Budget

___ Chapter Calendar of Events (18–24-months)

___ Current & Updated Chapter Bylaws and Policy Manual
Template available: CLRP > Office of the President > Governance

___ Paid Chapter Administrator (if applicable)

Required Annually

___ Annual Evaluation
CLRP > Office of the President > MPI Chapter Board Service

___ Proof of Insurance

Required only when there is a new or renewing contract

___ Business License

___ Copy of Contract/Business Service Agreement

___ Chapter Operations Form

November 15

___ Copy of annual tax return (U.S. Chapters Only)

Local Tax Deadline

___ Copy of annual tax return (Non-U.S. Chapters)

Chapter Compliance Document Checklist Cont.

Additional Compliance Requirements

1. Regular Member Meetings (notice at least 20 days prior to meeting) - Chapter Bylaws Article V, Sections 1 and 4)

2. Minimum of four educational events annually - Chapter Policy Manual, Article VII, Section 1

3. One Annual Members Meeting – Chapter Bylaws Article V, Section 2

4. Officers – a minimum of 5 officers filling 7 minimum roles – Chapter Bylaws Article VI, Section 1

5. Board retreats – one annual retreat is required (with MPI-Verified Facilitator) – Chapter Policy Manual Article IV, Section 2

6. Paid administrators must meet all requirements - Chapter Policy Manual Article V, Section 7

7. Adhere to brand standards and trademarks - Chapter Policy Manual Article VIII, Section 1

8. 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