NON PROFIT ANNUAL TO DO LIST

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| Priority | Due Date | What | Who | In Progress | Done |
|  | JANUARY | Annual Filing |  |  |  |
|  |  | Financial Year End Statements |  |  |  |
|  |  | Critical date planning for the year |  |  |  |
|  | FEBRUARY | AGM notice & AGM preparation |  |  |  |
|  |  | Grant reporting/ applications |  |  |  |
|  | MARCH | Society returns – Alberta Government |  |  |  |
|  |  | AGM & board elections |  |  |  |
|  |  | Board training/ new members onboard |  |  |  |
|  | APRIL | Insurance renewals/ risk management |  |  |  |
|  |  | Annual review of bylaws |  |  |  |
|  | MAY | Marketing |  |  |  |
|  |  | Maintenance |  |  |  |
|  | JUNE | Community events |  |  |  |
|  |  | Board social outdoors |  |  |  |
|  | JULY/ AUGUST | Staff & Board performance review/ check in |  |  |  |
|  | SEPTEMBER | Fundraising |  |  |  |
|  | OCTOBER | Annual Survey |  |  |  |
|  |  | Staff/ volunteer appreciation |  |  |  |
|  |  | Budgeting |  |  |  |
|  | NOVEMBER/ DECEMBER | Annual Program review/ strategic planning |  |  |  |
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|  | NOTES: |
|  | Created by participants of Non Profit workshop ran by Alberta Community Development & Town of Banff 2019 as an example of annual tasks & timeline.Check financial year for the organization – January to December or April to March? |