

## BRANCH PRESIDENT'S CHECKLIST

### PURPOSE

The following checklist has been developed to help branch Presidents ensure that required tasks are completed to retain their status as an AAUW Affiliate and meet Maryland state requirements, in addition to participating in AAUW Maryland activities.

### UPDATE OFFICER LIST ON AAUW WEBSITE

The continuing or outgoing president must update the officer list on the AAUW website by June 30 of each year. Submit additional changes as necessary.

### GOVERNANCE

Submit updated bylaws to [connect@aauw.org](mailto:connect@aauw.org) after they are approved by the branch membership and by the AAUW Maryland Bylaws chair.

Submit updated bylaws to [connect@aauw.org](mailto:connect@aauw.org) with mandatory changes when requested by AAUW after review by the AAUW Maryland Bylaws chair. (Mandatory changes do not require a membership vote.)

Ensure that your bylaws contain the mandatory language required by AAUW. (See <https://www.aauw.org/app/uploads/2020/02/2016-AAUW-Model-Bylaws-nsa.docx>. All of the articles in the Model Bylaws are mandatory.

Ensure that your bylaws provide for a minimum of three board members to meet AAUW requirement for at least a President/Administrator and Finance officer and Maryland requirement for at least three board members.

If your board wishes to meet or vote electronically, ensure that Maryland state requirements are met. The AAUW Maryland bylaws can be used as a model.

### FINANCE

Know your branch's status as a 501(c) (3) or 501(c) (4). Your branch's status affects donation and public policy advocacy. Refer to the branch affiliate agreement or IRS Determination Letter. If you do not have a copy of the IRS Determination Letter, the President or Treasurer can check on your branch's status by going to their Personal Snapshot on the AAUW Community Hub. Select Branch Management and then view the affiliate agreement. See the Branch Management Tutorial on <https://www.aauw.org/membership/new-systems-update/> for instructions.

Ensure that the Finance Officer submits financial update monthly or at each Board meeting.

Work with the Finance Officer to prepare budget (for July 1 – June 30) each year. Approve budget in accordance with branch bylaws as close to beginning of fiscal year as possible .

Ensure that the annual **Maryland State Department of Assessments & Taxation ("SDAT") Business Personal Property Taxes report is filed** by April 15<sup>th</sup>. The Department strongly encourages online filing when possible, since documents filed online will be processed significantly faster than those filed by mail.

Ensure that the Finance Officer files IRS 990

- AAUW will file for you if your branch is a 501(c) (4) and your total income (including realized gains from investment accounts) is less than \$50,000. Your Finance Officer will be notified of deadline and submission requirements. Due to AAUW by October 15.
- Otherwise, you must file 990N or 990EZ by November 15<sup>th</sup>. See [www.irs.gov](http://www.irs.gov) for requirements.

Appoint an audit committee to review and report back to board when Finance Officer changes – at a minimum - or annually.

Ensure that Finance Officer submits dues to National and the State upon receipt.

Ensure that funds received for AAUW Funds are submitted timely and the donors are properly credited.

Ensure that the Finance Officer annually confirms and updates, as necessary, local dues for the AAUW website and sends out dues notifications via email.

## **MEMBERSHIP**

Work with the Membership chair and Finance Officer to confirm that February 1 membership report is accurate (AAUW will mail the report to branches in March)

## **PROGRAMS**

Encourage programs that are related to AAUW's mission.

Ensure that those who are planning programs coordinate with the Finance Officer to cover expenses.

## **PUBLIC POLICY/ADVOCACY**

As a non-partisan organization, AAUW is governed by IRS and National policies. See AAUW's Policy 301 in the [AAUW Board of Directors Policy Book](#). Contact the AAUW Maryland Public Policy Vice President if you have questions.

## **USE OF LOGO**

[Information will be inserted when available]

## **FUNDRAISING, LOCAL SCHOLARSHIPS AND COLLABORATION WITH OTHER ORGANIZATIONS**

Be aware of the requirements for fundraising and for local scholarships. See <https://www.aauw.org/resources/member/governance-tools/state-branch/fundraising-policies-what-members-need-to-know/>. There are restrictions on who you can give grants to, scholarship selection processes and collaborating with other organizations.