



AFWA Chapter Calendar Templates

IDEAS FOR DEVELOPING A FRESH PROGRAMMING CALENDAR

Is your Chapter thinking of revamping your Programming Calendar?

There are many elements to consider in a programming calendar from time, day, and location, to CPE or Social, to cost. Varying the elements of your events may appeal not only to your current members, but encourage new members to attend as well.

AFWA minimum standards require only 6 events per year. However, the amount of programming your Chapter holds each calendar year should be based on your Chapter size and amount of volunteer support. Most importantly, don't assume you know what the members of your Chapter want... ask!

In the next few pages, we will provide several templates to consider when developing your Chapter Calendar. Please note – these templates should be used as a starting point for your Chapter's calendar. All topics and dates provided are suggestions. Develop what works best for your Chapter volunteers and members.

We also encourage you to view 'Building A Balance Programming Calendar' found in the Programming Toolkit of the AFWA Members Portal.

MONTHLY NOTES AND TOPIC SUGGESTIONS:

January/February: Many Chapters hold Annual Tax Updates in the early months of the year, providing important information specific to their state. Also, with everyone making (and breaking) New Year's Resolutions, this is a great time for Professional Development topics on Goal Setting or Time Management.

March/April: These month's can be tricky as many members are in the midst of their busy season. Consider hosting a Happy Hour to encourage a break from tax season, or an end of season special event.

May/June/July: This will be the time your Chapter is nominating and installing new leadership. Make announcements during your meetings of open volunteer positions and encourage participation from members. Summer is also a great time for social outings and membership drives.

August/September/October: Back to school season. Invite students for a career planning event or recognize scholarship recipients. This may also be a good season to host a joint event with another local organization.

November/December: The holidays provide a great excuse for a party. Host a holiday social and tie it in with a fundraiser either for your scholarship fund or a local charity.



TRADITIONAL CALENDAR (sample)

Based on the traditional calendar of many chapters, this calendar includes a monthly CPE program with an occasional social event or fundraiser.

Suggestions:

- This calendar is best for Chapters with many active volunteers. A Programming co-chair model will help distribute the work.
- Consider variety in the time, location, and cost of each event.

Sample Traditional Calendar

	EVENT	TOPIC	NASBA FIELD/LEVEL
JANUARY	CPE Program	Annual Tax Update	Tax/Update
FEBRUARY	CPE Program	Goal Setting/Time Management	Professional Development
MARCH	CPE Program	Technical topic	HR/Personnel/Basic or Intermediate
APRIL	Social	Post-Tax Season Happy Hour	
MAY	CPE Program	Technical topic	Basic or Intermediate
JUNE	CPE Program	Advanced workshop	Accounting/Advanced
JULY	CPE Program	Personal Development and Membership Drive: host a personal development CPE program. Encourage members to invite a friend! Popular topics include work/life balance, goal setting, organization, and personal branding.	Personal Development/Basic
AUGUST	Social	Summer Activity: painting or cooking class, attend a baseball game,	
SEPTEMBER	CPE program	Member Panel on Career Paths & Student Night: host a panel of Chapter members who can share their career stories. Invite students from a local university.	Personal Development/Basic
OCTOBER	CPE Program	Technical Topic	Ethics/Intermediate
NOVEMBER	CPE Program	In honor of small business Saturday, host a program beneficial for small business owners	Business Management /Intermediate
DECEMBER	Social	Holiday Party: make it a fundraiser and collect apparel for dress for success. Bring an outfit for free admission, or bring an outfit for a drink ticket.	



SEMINAR CALENDAR (sample)

This calendar features a quarterly seminar or workshop that will offer numerous CPE hours on one day. Between seminars, the Chapter will host networking events.

Suggestions:

- This calendar is best for Chapters looking to avoid monthly planning. Consider a different committee or alternating committees for each seminar to spread the work load.
- Fit up to 4 hours into a half day seminar, followed by or kicked off with a networking lunch.
- Promote your seminar dates well in advance to give plenty of planning time for attendees
- Be sure to promote workshops and seminars to the community, these can be great for non-AFWA members to attend.
- Make a distinct difference in registration cost for members and nonmembers to attend each seminar, this will encourage attendees to join AFWA

Sample Seminar Calendar

	EVENT	TOPIC	NASBA
JANUARY	Seminar	Annual Tax Seminar	4 CPE/Variou
FEBRUARY	Social	Coffee meet up	
MARCH	Social	Mid-Tax Season Happy Hour	
APRIL	Social	Post-Tax Season Dinner	
MAY	Seminar	Personal Development/Communications Seminar	4 CPE/Variou
JUNE	Social	Dinner and Leadership Installation	
JULY	Social	Summer Activity: painting or cooking class, attend a baseball game,	
AUGUST	Seminar	CPE Seminar	4 CPE/Variou
SEPTEMBER	Social	Membership Drive	
OCTOBER	Social	Scholarship Dinner/Student Night	
NOVEMBER	Seminar	CPE Seminar: Feature a panel of successful women in the industry	4 CPE/Variou
DECEMBER	Social	Holiday Party: make it a fundraiser and collect apparel for dress for success. Bring and outfit for free admission, or bring an outfit for a drink ticket.	



ADVANCED CALENDAR (sample)

The premise of this calendar is to host advanced workshops for segments of membership throughout the year. Between each advanced session, professional development and social events will bring the entire membership together.

Suggestions

- Not all events will appeal to all members. But all members will have an opportunity for some quality advanced technical information at some point in the year.
- This calendar appeals to a variety of members and is a great way to bring in topics that appeal to accountants, finance pros, executives and more. Best for Chapters with a lot of members or Chapters looking to grow a particular segment of membership.
- Make a distinct difference in registration cost for members and nonmembers to attend each advanced event, this will encourage attendees to join AFWA

Sample Advanced Calendar

	EVENT	TOPIC	NASBA FIELD/LEVEL
JANUARY	CPE - Advanced	Tax Update	Tax/Advanced
FEBRUARY	CPE – PD	Work/Life Balance and time management	Professional Development/Basic
MARCH	Social	Tax season breather/happy hour	
APRIL	CPE - Advanced	Audit: Be sure this session falls after the tax deadline!	Audit/Advanced
MAY	CPE - PD	Personal Branding	Professional Development/Basic
JUNE	Social	Summer Activity and Board Installation	
JULY	CPE - Advanced	Accounting	Accounting/Advanced
AUGUST	CPE - PD	Community related topic	
SEPTEMBER	Social	Scholarship fund fundraiser	
OCTOBER	CPE - Advanced	Finance	Finance/Advanced
NOVEMBER	CPE - PD	Member Panel on Career Paths & Student Night: host a panel of Chapter members who can share their career stories. Invite students from a local university.	Professional Development/Basic
DECEMBER	Social	Holiday Party: make it a fundraiser and collect apparel for dress for success. Bring and outfit for free admission, or bring an outfit for a drink ticket.	



TRACK CALENDAR (sample)

This calendar sets up different tracks for each segment of membership, with a quarterly networking event to bring all members together.

Suggestions

- Best for larger Chapter that can support attendance at small events
- Designate a Programming Chair for each track and allow each Chair to come up with their own calendar.
- Survey members most likely to attend each track and determine time, date, location that will work best for each
- A good communications plan is very important with this calendar.

Sample Track Calendar

	Accounting Track	Finance Track	Young Professional Track
JANUARY	Program	Program	
FEBRUARY			Program
MARCH	Social Event: Tax Season Break		
APRIL		Program	
MAY	Program		Program
JUNE	Summer Social and Board Installation		
JULY		Program	Program
AUGUST	Program		
SEPTEMBER	Social Event: Scholarship Dinner		
OCTOBER		Program	
NOVEMBER	Program		Program
DECEMBER	Social Event: Holiday Dinner		

MORE MONTHLY NOTES AND TOPIC SUGGESTIONS:

AFWA's Accountability eNewsletter is organized into monthly themes. Tie your Chapter in with National by following the topic themes in our newsletter.

January: Balance

July: Tech

February: Diversity

August: Education/Financial Literacy

March: Women's History

September: Professional Development

April: Professional Development

October: Health

May: Small Business

November: NonProfit/Volunteer

June: Women in Business

December: Job Forecast