

National Governance Cycle As of 6-1-23

Month	NLT	XC	BOD	Foundation	National Office
January			National Leadership Nominating Committees convene (one for President Elect & VPs, one for Elected Director); non-selects contacted for follow-up RVPs: Post streamer submissions; RVP selections of LDP participants due	Install new board members and board positions. Strategic Planning Meeting	Nominating Committees adjourn; National Office On-Site
February	National Nomination notifications made (on ballot or not).		RVPs: Award Nominations due		National Office Audit and Tax preparation; appoint Audit committee; hire independent auditor
March	National Leaders issue guidance for Annual Work Plans	XC Meeting (CapWeek);	Capital Week and Foundation fundraising event; develop Annual Report for last fiscal year; report success of previous FY Foundation-funded programs to National Office. RVPs: Post Annual Reports and Awards submissions due	Foundation Reception	National Audit and taxes due; National Election commences; submit SAME Foundation Support Annual Report to the Foundation.
April	President- Elect & XD begin determining XC members and Appointed Directors; National Election results presented, notifications made; Assign Elected Directors; Assign National Officers	Outreach to members visibly serving at Post/Nat'l levels for Nat'l Officer and Elected Director positions for following year	COIs: Prepare and submit Annual Work Plan drafts to COI Manager (capture any departing COI Chair guidance). RVPs: Work with National Officer to submit Post/Region Strategic Plan Progress; Student Chapter Streamer Submissions due;		National Election voting closes
May	Conduct exit briefs for old BOD; AOF Chair provides new Fellow commitments; EAG Meeting		Strategic Plan update; awards & recognition; new BOD member training. Appoint XC and Appointed Directors.	Foundation Board Meeting; report to National BOD; Current LDP Class Graduates, New LDP Class Inaugurated.	Warfighter; Annual Report to Membership; NLT/XC/BOD Meetings scheduled for following year.
June	Annual Investment Policy Guidance (IPG) Review Solicit R2C members.		COIs: Develop program for the calendar year; finalize Annual Work Plans. RVPs: Graduating Post President follow-up. Requests for Resource Support due to RVPs & National Officers.	Foundation Board determines if additional Board members are to be selected. Foundation governance committee provides criteria to Foundation Board for selection.	Annual Governance & Management Review Prep; Membership Review Prep
July		Staff prepares requirements – prioritized for R2C.	COIs: Annual Work Plans for following year are due 1 July to COI Manager. National Officers submit Requests for Resource Support to the National Office. R2C Convenes.	Foundation and SAME solicit nominations.	Mid-year Financial Forecast

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August	President's Guidance for National Election established and presented to BOD and Post Presidents.	XC Meeting (PLW); Annual Governance Review (including Bylaws review); COI Annual Work Plan Approval (resource requirements); Membership Review; XC provides budgetary guidance to National Office; approve Nov. BOD Meeting Agenda	XC Meeting at PLW to deliberate priorities of requirements as presented by the R2C.	Request/Review of Foundation Support requirements is provided to the Foundation. Foundation Board votes on nomination recommendations from Nominating Committee.	Begin budget development for following fiscal year using input from Special Aug. BOD Meeting.
September	Nominating Committees selected. Society Request for Foundation Support sent to Foundation.	Implementing Documents Review	RVPs: 1 st Semester Student Chapter Status Reports due KLDC: Recruitment Webinar in conjunction with Nat'l Officer nomination announcement.	SAME XC votes on recommendations from Nominating Committee.	Member needs survey (every three years 2015, 2018 ...); Nomination announcement to membership
October		R2C reconvenes to review the Foundation's funding decision against the request; determines final program funding recommendation to XC.	COIs & RVPs: Prepare and submit Semi-Annual Report to National Leader	Foundation notifies the National Office of amount of funding to be made available for execution of upcoming FY. Board selectees are notified.	National Election nominations open.
November	Strategic Plan Assessment; EAG Meeting		BOD Meeting (SBC) - Strategic Plan Assessment; Annual Work Plan Impact Report. Begin succession planning (COIs & RVPs).	Foundation President reports to National BOD at SBC Foundation Board Meeting at SBC	Prepare for Budget Brief. COI Managers assess Annual Work Plans
December	Succession planning for following year is complete.	National Office Budget Brief and National Office Priorities for the next Fiscal Year to XC. Foundation support accounted for in budget.	Present succession to National Leaders (COIs & RVPs)	New board members are notified.	National Election nominations close & committees convene. National Office Budget Brief to XC, feedback to COIs, manage execution, measure and report ROI (to include staff labor).
Recurring					
Weekly	XD/President Call				XD Friday Note
Bi-Weekly	NLT Calls	XC Calls/Meetings		XD/Foundation Chair Call	
Monthly			SLO Calls COI Steering Committee calls RVP Call		
Quarterly	Investment Firm briefing; Post Presidents Call with		Post Presidents Call with the National President; COI Chair Call		National Office conducts Quarterly Management

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	the National President; COI Chair Call				Reviews (QMR) – XD updates the XC