

**TEXAS ASSOCIATION OF LEGAL PROFESSIONALS - MASTER CALENDAR
2011-2012**

BOD	Board of Directors
FBM	Fall Board Meeting
FC	Fall Educational Conference
AM	Annual Meeting
AC	Annual Educational Conference
EC	Executive Committee
LTC	Legal Training Course
O&C	Officers and Chairmen
SR & BL	TALP Standing Rules and Bylaws

Event	Timing	Date
NALS ALS exam for LTC (1st Saturday)	June 4, 2011	06/04/2011
Fall Conference (FC)	The President shall issue a call to each regular meeting of the BOD to all members at least 30 days prior thereto	08/31/2011
	Date of FC determined 1 year in advance and may not be earlier than September 1 nor later than October 15	09/01/2011– 10/15/2011
	Fall Educational Conference – Waco (FBM)	Sept. 30-Oct. 1, 2011
NALS Certification exams	Last Saturday in September and First Saturday in March	09/24/2011 03/03/2012
Annual Conference (AC)	The President shall issue a call to the AC to all members at least 30 days prior thereto	04/05/2012
	Date of AC determined 1 year in advance and may not be earlier than April 1 nor later than May 15	04/01/2012– 05/15/2012
	Annual Meeting & Educational Conference – San Antonio	May 4-5, 2012
Duties of Elected Officers	The President shall, within 30 days after taking office, appoint the chairmen of all committees and subcommittees, except as otherwise provided in the BL, subject to the approval of the EC or the BOD	05/29/2011
General Duties of O&C Check Reimbursements	Submit check request within 45 days of expense date	
	Submit quarterly Report to President-Elect for publishing in Texas Roundup	07/15/2011 10/15/2011 01/15/2012 04/15/2012
General Duties of O&C Turnover of files to successor	Turn over two full years of files to successors at or within 2 weeks of AC (except Treasurer, Fundraising, and AC chair)	05/13/2011
President	Deliver President's AC files to incoming President no later than 60 days after AC	06/28/2011
	File Form 802 with Secretary of State not more than every four years – last filed November 2010, so not due again until November 2014 – check Secretary of State website yearly to make sure requirement has not changed	11/15/2011

Event	Timing	Date
	Renew the Trademark with Secretary of State – current Trademark is good through June 19, 2017, so begin working on it January 2017 – check Secretary of State website yearly to make sure requirement has not changed	06/19/2017
	May suspend dates for amendments to Bylaws by giving notice 10 days prior to each meeting (requires 2/3 vote at meeting)	
President-elect	Compile quarterly Reports, prepare Roundup and submit to Webmaster for posting to website	08/01/2011 11/01/2011 02/01/2012 05/01/2012
	Review Policy and Procedures Manual for revisions	03/01/2012
Secretary	Send draft of BOD and AC minutes within 30 days from meeting to Executive Committee in office at time of meeting for review, correction and President's approval before preparing in final form	AC 05/29/2011 FC 10/30/2011
	Reviewers to return draft minutes to Secretary 10 days after receipt	AC 06/08/2011 FC 11/09/2011
	AC files shall be delivered to incoming Secretary no later than 60 days after AC	06/28/2011
	Outgoing Secretary to update TALP History and send update to Webmaster for posting to website	06/28/2011
	Distribute final form of BOD and AC minutes to all members not more than 60 days from date of meeting	AC 06/28/2011 FC 11/29/2011
	Send request for FC call (60 days prior)	08/01/2011
	Shall send the call , at the direction of the President, to the AC and FC 30 days prior thereto	FC 08/31/2011 AC 04/05/2012
	Compile reports of officers and chairmen for distribution by e-mail to all members prior to FC and AC as directed by the President	
	Prepare credentials list and furnish to EC	FC 09/30/2011 AC 05/05/2012
	Prepare report of EC actions for each board meeting	FC 09/30/2011 AC 05/05/2012
	Send letter to chapters requesting contributions for President's gift	01/15/2012
	Confirm with Immediate Past President that she/he has ordered past president pin and plaque or award and give completion date of 03/30/2012	02/15/2012
	Send request for AC call (60 days prior)	03/06/2012
	Treasurer	Pay Regional Assessment on or after May 1
Check on bond renewal		06/01/2011
Bond expires		06/30/2011
Files must be transferred to new Treasurer		At AC or by 06/30/2011
File IRS Form 990 by September 15		09/15/2011

Event	Timing	Date
	(1) Records for May 1-August 31 due to Financial Review by September 15; (2) Treasurer's report due at FC	(1) 09/15/2011 (2) 09/30/2011
	(1) Records for September 1-April 30 due to (outgoing) Financial Review by May 15; (2) Treasurer's report due at AC or FC	(1) 05/15/2011 (2) 09/30/2011
	Deliver files of financial records for previous years to incoming Treasurer at AC or by June 30	05/01/2011 or 06/30/2011
	Submit first draft 2012-2013 budget to EC	12/01/2011
	Certify voting members with Roster and N&E	11/30/2011
	File Texas Sales & Use Tax Return	01/20/2012
	Send preliminary budget to O&C and directors for review and comment	02/01/2012
	President and Treasurer to prepare proposed budget and distribute to each member	03/01/2012
	Close financial records	04/30/2012 or 30 days after AC (06/06/2012)
Parliamentarian	Send amended local chapter bylaws to NALS with cert/adoption as necessary	
	Send amended TALP bylaws to NALS with cert/adoption (outgoing Parliamentarian)	06/15/2011
	Furnish copies of Rules of Procedure and Voting Instructions to voting body at FC	09/30/2011
	Certify computation of Certification awards not later than 10 days prior to AC	04/25/2012
	Furnish copies of Rules of Procedure and Voting Instructions to voting body at AM	05/05/2012
Bylaws/Standing Rules	The Chair shall issue a call for SR & BL amendments . . . (90 days prior)	FBM 07/02/2011 AM 02/15/2012
	Following each board mtg. and AM, prepare and forward to Parliamentarian for distribution to EC and to Secretary for cert. of adoption (for BL) all cumulative amendments or revisions of BL and SR as adopted within 30 days after mtg. Also send to Webmaster for posting to website	FBM 10/30/2011 AM 06/06/2012
	Proposed amendments to be submitted to BL/SR chair at least 60 days prior to next meeting; BL/SR chair furnish notice to all officers, chairmen, and directors at least 45 days before the meeting	FBM 08/01/2011 08/16/2011
		AM 03/06/2012 03/21/2012
Certification	Compute Certification awards and have verified by Parliamentarian no later than 10 days prior to AM	04/25/2012
	Plan Recognition Function/present awards	05/04 – 05/05/2012
Education	Plan and coordinate legal ed seminars 90 days prior to each conference	FC 07/02/2011 AC 02/05/2012
	Provide schedule of CLE topics and speakers to Secretary to be included in each call	FC 08/01/2011 AC 03/06/2012
	Obtain speaker handouts 30 days prior to each conference	FC 08/31/2011 AC 04/05/2012
	Maintain list of CLE topics for last 3 years	Ongoing

Event	Timing	Date
Professional Development	Plan and coordinate leadership/professional development workshops at FC and AC and any regional/chapter workshops requested	FC 09/30-10/01/2011 AC 05/04-05/2012
Fundraising	Submit Texas Sales & Use Tax Resale Certificate to vendors when ordering finance items for resale	
	(1) Records for September 1-April 30 due to (outgoing) Financial Review May 15; (2) Fundraising chair's report due at AM or FBM	(1) 05/15/2011 (2) 09/30/2011 and 05/05/2012
	Records for May 1-August 31 due to Financial Review September 15; Fundraising chair's report due at FBM	09/15/2011 09/30/2011
	Have finance items for sale at mtgs	FC 09/30-10/01/2011 AC 05/04-05/2012
	Close records for fiscal year by April 30	04/30/2012
Financial Review	Treasurer and Fundraising records for September 1- April 30 due to (outgoing) Financial Review by May 15	05/15/2011
	Financial Review to complete review of Treasurer/Fundraising records within 30 days of receipt	06/14/2011
	AC chair financial records for AC due to Financial Review 45 days after AC	06/13/2011
	Return books to Treasurer within 7 days of Financial Review (Sept. 1-May 30 books delivered to incoming Treasurer)	06/21/2011 10/07/2011
	(1) Report to EC and deliver books of AC chair to 2011 AC Chair within 7 days after review complete; (2) Financial Review report due at FC	(1) 06/21/2011 (2) 09/30/2011
	Financial Review to complete review of 2011 AC chair records within 30 days	07/13/2011
	Treasurer and Fundraising records for May 1-August 31 due to Financial Review by September 15	09/15/2011
	Financial Review report on those records at FC	09/30/2011
	Upon completion of review of Treasurer/Fundraising records for September 1-April 30, outgoing Financial Review to provide Financial Review report to current Financial Review chair for delivery to BOD at FC	09/30/2011
	Financial Review to complete review of Treasurer/ Fundraising records within 30 days of receipt	10/30/2011
	(1) Report to EC and deliver books of FC chair to next FC chair within 7 days after review complete; (2) Financial Review report due at AC	(1) 11/06/2011 (2) 05/05/2012
	2011 FC chair financial records due to Financial Review 40 days after FC	11/09/2011
	Financial Review to complete review of 2011 FC records within 30 days	12/09/2011
	Records delivered to 2011 FC chair	12/21/2011

Event	Timing	Date
	Financial Review report on those records at AC	05/05/2012
Meetings Coordinator	Prepare and keep current the Guidelines for Bidding and Planning Board and Annual Conferences	Ongoing
	Provide Site Comparison to Secretary to be included in each call	FC 08/01/2011 AC 03/06/2012
Nominations & Elections	Issue call for nominations for officers no later than September 1	09/01/2011
	Prepare blank ballots and tellers' reports for use at FBM and AM	FBM 09/30/2011 AM 05/05/2012
	Prepare voting member packets for each voting member which include items to be voted on not previously provided to voting members for FBM and AM	FBM 09/30/2011 AM 05/05/2012
	BallotBox Annual Installation (Electronic Voting & Surveys) due in the amount of \$220 each	10/04/2011 10/04/2012 10/04/2013 10/04/2014
	Close nominations for officers no later than October 15	10/15/2011
	Obtain list of eligible members from NALS – determined according to dues received by NALS by October 31 of each year	11/15/2011
	Obtain written consent of all nominees no later than November 15	11/15/2011
	President approve sample ballot	12/01/2011
	Furnish list of candidates to all members no later than December 15	12/15/2011
	Issue call for nominations for honorary members not later than 90 days after FC	12/29/2011
	Prepare ballot and distribute to all voting members no later than January 1	01/01/2012
	Candidates to furnish items for posting on the website; furnish list of candidates to all members	12/15/2011
	Post candidate profiles and photos to web site	12/22/2011
	Request for replacement or paper ballot	01/15/2012
	Close nominations for honorary members 45 days after call is issued	02/12/2012
	Elections closed no later than February 1	02/01/2012
	Certify results to President and announce to members no later than February 15	02/15/2012
Roster	Prepare mini-roster and distribute at AC	05/01/2012
	Notify NALS Resource Center of TALP O&C after AC and throughout year	05/15/2011 05/15/2012
	Notify Legal Directories Publishing Co. of new roster of TALP O&C (date not specified in SR)	05/15/2011 05/15/2012
	Notify Executive Director of State Bar of new roster of TALP O&C (date not specified in SR)	05/15/2011 05/15/2012
	Notify Papillion Publishing of new roster of TALP O&C (date not specified in SR)	05/15/2011 05/15/2012
	D/L submit roster (chapter information, O&C information, and committees to EC for approval	09/02/2011

Event	Timing	Date
	Prepare a roster (to be known as the "Official Roster") . . . [to] be distributed to chapter directors and O&C at the FC	09/30/2011
	At FC provide President-elect one complete roster of all members to use as reference for appointing chairmen and committee members	09/30/2011
	Prepare mailing labels for members and deliver to Docket editor to mail July, October, January, and April issues	06/15/2011 09/05/2011 12/10/2011 03/05/2012
	Coordinate with Treasurer list of eligible voters, which Treasurer will certify and submit to N&E	11/30/2011
	Prepare supplemental roster reflecting changes during interim period between FC and AC; distribute by e-distribution to all O&C and members the first week of February	02/06/2012
	Prior to AC, request local chapter rosters for distribution at AC	04/01/2012
	Forward copy of full roster of members to Secretary to be placed in Texas ALP permanent files	04/30/2012
	Do not delete non-renewing members from Official Roster until NALS has removed them from NALS roster (usually 90 days after non-renewal)	Ongoing
<i>Texas Docket</i>	<i>Texas Docket</i> to be issued four times per year, in July, October, January, and April (detailed calendar attached as page 10)	06/30/2011 09/30/2011 12/30/2011 03/30/2012
E-distributor	Submissions must be approved by the President and received 2 weeks prior to distribution date	Ongoing
Awards	Provide LPY/Scholarship forms to Executive Committee for approval at EC retreat	05/15/2011
	Furnish LPY Rules and Nomination Form to E-Distributor to be sent to the members	12/01/2011
Awards – LPY	Select LPY judges and submit to EC for approval no later than January 1	01/01/2012
	Deadlines (1) to submit LPY nomination and (2) for receipt by Awards chair	(1) 02/01/2012 (2) 02/10/2012
	Deadline to forward nominations to LPY judges	02/15/2012
	Deadline to acknowledge receipt of each nomination received; notify local chapters of disqualified entries and reason therefore	02/15/2012
	Deadline for receipt of judges' completed documents	03/01/2012
	Deadline to notify finalists and alternates	03/10/2012
	(1) Provide information forms to finalists to complete and (2) return to chair	(1) 03/10/2012 (2) 04/01/2012
	Post names of finalists to website	03/15/2012

Event	Timing	Date
	Final tabulation sheet to be signed and dated by judges and chair after completion of interviews at AC; President then approves and attests to scoring and signs and dates final tabulation sheet	05/04/2012
	All rating sheets, evaluation forms, judges' notes, final tabulation form, etc., to be sealed in envelope and delivered to President for destruction at close of AC	05/05/2012
	Provide articles on finalists with photos to Docket	05/09/2012
Awards – Scholarship	Select scholarship judges and submit to EC for approval no later than January 1	01/01/2012
	(1) Deadline to submit scholarship apps (Awards to acknowledge receipt); (2) deadline for receipt of apps by Awards chair	(1) 02/01/2012 (2) 02/03/2012
	Deadline to submit apps to judges	02/10/2012
	Deadline to acknowledge receipt of all apps	02/10/2012
	Deadline for receipt of judges' completed documents	03/01/2012
	Deadline to notify successful candidate and nominating chapter	03/15/2012
	Deadline for thank-you letters to each participating chapter; include notification of scholarship recipient	04/02/2012
	Provide article on recipient to Docket	05/15/2012
Membership	Obtain membership report (from Treasurer) for calculations of membership awards	07/31/2011 02/28/2012
Budget	(1) President and Treasurer prepare proposed budget and distribute to directors no later than March 1; (2) to be approved by BOD at AM	(1) 03/01/2012 (2) 05/05/2012
AC – Bids	AC bids to be submitted to President and Meetings Coordinator no later than 60 days prior to AC 1 year in advance	03/06/2012
2011 AC – Chair	AC finance chair's final accounting of AC shall be concluded no later than 40 days after AC	06/08/2011
	Send files (except financial records) to next hosting chapter for 2012 AC	6 weeks after AC (06/10/2011)
	AC chair to submit final AC financial report to BOD at FC following AC	09/30/2011
2012 AC – Chair	AC chair to submit proposed AC hotel contract to EC	06/01/2011
	AC chair to submit proposed AC budget, registration form, and schedule of events to Executive Committee within 60 days of winning the bid	06/28/2011
	AC chair to furnish quarterly written status reports to President	08/02/2011 11/02/2011 02/02/2012
	AC chair to provide list of registrants to President 2 weeks prior to AC	04/20/2012
2011 AC – Finances	AC finance chair's final accounting of AC shall be concluded no later than 40 days after AC	06/08/2011

Event	Timing	Date
	AC finance chair's balance sheet and P&L statement due to Financial Review with records [see p. 9 containing chart of deadlines for Financial Review] (45 days following AC)	06/13/2011
	AC chair to present distribution check to TALP with final accounting within 7 days of completion of review by Financial Review	07/15/2011
2012 AC – Registrations & Reservations	AC chair to distribute approved registration form and schedule of events at FC and provide to website	09/30/2011
	AC chair to provide approved registration form and schedule of events to Docket editor for January issue	11/02/2011
2011 AC – General	All AC files, except financial records, to be given to next AC-hosting chapter within 6 weeks after AC	06/10/2011
	AC financial records to be forwarded ASAP after Financial Review, but no later than FC	08/01/2011
Fall Conference – Bids	FC bids to be submitted to President and Meetings Coordinator no later than 60 days prior to FC 1 year in advance	08/01/2011
2011 FC – Chair	FC chair to furnish quarterly written status reports to President	08/02/2011
	FC chair to provide list of registrants to President 2 weeks prior to FC	09/16/2011
	FC chair to prepare and submit final FC financial report to BOD at AC	05/05/2012
2012 FC – Chair	FC chair to furnish quarterly written status reports to President	02/02/2012 05/02/2012 08/02/2012
	FC chair to submit proposed FC hotel contract to EC	11/15/2011
	FC chair to submit proposed FC budget, registration form, and schedule of events to Executive Committee within 60 days of winning the bid	11/29/2011
2011 Fall Conference – Finances	FC finance chair's final accounting of FC shall be concluded no later than 40 days after FC	11/09/2011
	FC finance chair's balance sheet and P&L statement due to Financial Review with records [see p. 9 containing chart of deadlines for Financial Review] (45 days following FC)	11/14/2011
	FC chair to present distribution check to TALP with final accounting within 7 days of completion of review by Financial Review	12/21/2011
2011 Fall Conference – Registrations & Reservations	FC chair to distribute approved registration form and schedule of events at AC and provide to Docket editor and website for publication	05/09/2011
Immediate Past President	Order pin and plaque to be presented to outgoing president at AC	02/15/2012

Event	Timing	Date
NALS Conferences	2011 NALS Region 6 Annual Meeting & Educational Conference in Amarillo, TX	July 15-17, 2011
	2011 National Forum & Education Conference in Cincinnati, OH	October 13-16, 2011
	2012 NALS Professional Development Conference in Tulsa, OK	March 1-3, 2012
	2012 National Forum & Education Conference in Portland, OR	October 18-21, 2012
	2013 National Forum & Education Conference in Atlanta, GA	October 17-20, 2013

FUNDRAISING CHAIR'S CHART:

Reporting Period Covering	Records Due to Financial Review	Fundraising Chair's Report Due
May 1 through August 31	September 15	Board Meeting
September 1 through April 30	May 15	Annual Meeting or Board Meeting

FINANCIAL REVIEW CHAIR'S CHART:

Records	Records Due to Financial Review Chair	Reporting Period Covered	Financial Review Report Due
Treasurer and Fundraising Chair	September 15	May 1 through August 31	Annual Meeting
Treasurer Fundraising Chair	May 15	September 1 through April 30	Board Meeting
Annual Conference Chair	45 days following Annual Conference	Annual Conference	Board Meeting
Fall Conference Chair	45 days following Fall Conference	Fall Conference	Annual Meeting

THE TEXAS DOCKET	
JULY ISSUE	
05/16/2011	Receive articles
05/30/2011	Send first draft to EC and committee proofreaders
06/06/2011	Revisions back to editor
06/15/2011	Receive mailing labels from Roster for those who do not have email
06/20/2011	Editor proofs final draft, converts to PDF, transmits to Webmaster and E-Distributor
06/30/2011	Webmaster posts on website; E-Distributor sends mass email re: posting; mail those necessary
OCTOBER ISSUE	
08/02/2011	Receive articles
08/30/2011	Send first draft to EC and committee proofreaders
09/08/2011	Revisions back to editor
09/15/2011	Receive mailing labels from Roster for those who do not have email
09/20/2011	Editor proofs final draft, converts to PDF, transmits to Webmaster and E-Distributor
09/30/2011	Webmaster posts on website; E-Distributor sends mass email re: posting; mail those necessary
JANUARY ISSUE	
11/02/2011	Receive articles
11/30/2011	Send first draft to EC and committee proofreaders
12/05/2011	Revisions back to editor
12/15/2011	Receive mailing labels from Roster for those who do not have email
12/20/2011	Editor proofs final draft, converts to PDF, transmits to Webmaster and E-Distributor
12/30/2011	Webmaster posts on website; E-Distributor sends mass email re: posting; mail those necessary
APRIL ISSUE	
02/02/2012	Receive articles
02/28/2012	Send first draft to EC and committee proofreaders
03/05/2012	Revisions back to editor
03/15/2012	Receive mailing labels from Roster for those who do not have email
03/20/2012	Editor proofs final draft, converts to PDF, transmits to Webmaster and E-Distributor
03/30/2012	Webmaster posts on website; E-Distributor sends mass email re: posting; mail those necessary