



2025-2026 Dates and Deadlines Calendar

October 1, 2025 – September 30, 2026

Monthly Chapter Tasks	Chapter Responsible Party	Item
	Communications Director	<ul style="list-style-type: none"> Send Chapter <i>EWI Connect</i>* to Chapter members, firm executives and ewi@ewiconnect.com. *Refer to ewiconnect.com / Chapter Resource Guide / Chapter Board of Directors: Communications Director for list of items to consider including in newsletter
	Secretary	<ul style="list-style-type: none"> Send Chapter Membership minutes to Chapter members for approval. Send Chapter Membership and Chapter Board minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com
	Treasurer	<ul style="list-style-type: none"> Review reports from Corporate Office with renewal invoices to be sent to Representatives for accuracy in billing.
	Retention & Recruitment Director	Mail via Postal/Email to Corporate: <ul style="list-style-type: none"> Application for Membership Application for Chapter Life Membership Replacement Representative Firm Information Change Form - can be done online by representative in the Member Information Center or submitted via mail/email. (Payments to the Corporate Office due within 30 days (in full) of submission. The chapter portion will be returned via ach to chapter bank accounts by 10th of following month)

2025 October



Legend:
 Corporate Office Deadline
 Chapter Tasks
 All Representatives
 Attention to Date/Deadline
 Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
29	30	01 Notify the EWI Corporate Office of Scholarship Chair(s) if not on Form 40 that was due August 29. Host Board Retreat, Finalize Committees; Update EWI Connect masthead /website/letterhead with new Corporate and Chapter Boards	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24 Chapter Leadership Call @ 12:00 PM CST	25	26
27	28	29	30	31	01	02
		Notes: Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2025 November



Legend:

- Corporate Office Deadline
- Chapter Tasks
- All Representatives
- Attention to Date/Deadline
- Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
27	28	29	30	31	01 Chapter President confirms with Committee Chairs that initial committee meetings are scheduled. Due to the Corporate Office: 2025 YEAR-END Financial Reports*	02
03	04	05	06	07	08	09
10	11	12	13	14	15 Establish ASIST/EWISP contact list of agencies, schools, etc	16
17	18 B/C/DP Training Call for 2026 Scholarship Program – see Resource Library for Call Information	19	20	21	22	23
24	25	26	27	28	29	30
		<p>Notes:</p> <p>*Annual Operating Financial Report along with Affiliate letter (letter to be placed on Chapter letterhead and signed by Chapter President), Annual B/C/DP Financial Report; B/C/DP Financial Review</p> <p>Prepare a thank you letter and list of objectives for the coming year to be sent to members prior to dues renewal invoices being emailed as Anniversary Dates arise.</p> <p>Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com</p>				

2025 December



Legend:
 Corporate Office Deadline
 Chapter Tasks
 All Representatives
 Attention to Date/Deadline
 Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
01	02	03	04	05	06	07
08 Post ASIST scholarship details on Chapter website with links to ASIST Scholarship* Send letters to participating high schools for EWISP*	09	10 Chapter Leadership Call @ 12:00 PM CST	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
Notes: *See training materials and Tool Kit in Resource Library Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com						

Legend:
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2026 January



MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
29	30	31	01	02 Follow-up with EWISP schools* Select and secure EWISP and ASIST Judges Chapter Board approval of Literacy Project	03	04
05 Scholarship Applications open on Kaleidoscope.	06	07	08	09	10	11
12	13	14 Chapter Leadership Call @ 12:00 PM CST	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
		Notes: *As a reminder and send schools information about online application process with Kaleidoscope. Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2026 February



Legend:
 Corporate Office Deadline
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 All Representatives
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MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
26	27	28	29	30	31	01
02	03	04	05	06	07	08
09	10	11 Chapter Leadership Call @ 12:00 PM CST	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	01
		Notes: Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				


Legend:
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2026 March

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
23	24	25	26	27	28	01
02	03 Due to the Corporate Office: Names and Email Addresses of 3 Chapter Judges for EWISP and ASIST	04	05	06	07	08
09	10	11 Chapter Leadership Call @ 12:00 PM CST	12	13	14	15
16 Corporate Nominating Committee notifies members of opportunities to submit Corporate Board Applications	17	18	19	20	21	22
23	24	25	26	27	28 Chapter EWISP/ASIST Scholarship Deadline - All student applications must be completed by this date by 11:59 PM CT.	29 Review of applications for missing materials. Chapter has the option to contact applicant regarding missing materials.
30	31 Review of applications for missing materials. Chapter has the option to contact applicant regarding missing materials.	Notes: March = Consider Corporate Service and submitting an application; Consider who else in the Chapter qualifies to apply and encourage stepping into Corporate Leadership Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2026 April				Legend: Corporate Office Deadline Chapter Tasks All Representatives Attention to Date/Deadline Recommendations		
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
30	31	01 LCAM 2025 - Registration Opens (Early Bird Pricing Until June 30) Review 2026 LJP Awards Criteria and Submit Nominations by July 8, 2026 Chapter Straw ballots sent to members	02 Review of applications for missing materials. Chapter has the option to contact applicant regarding missing materials.	03 Chapter Judging begins for EWISP and ASIST and is open until May 9, 2025 – date for completion.	04	05
06	07	08 Chapter Leadership Call @ 12:00 PM CST	09	10	11	12
13	14	15	16	17	18	19
20	21	22 Deadline for submission of Proposed Bylaw Amendments**	23	24	25	26
27	28	29	30	01	02	03
		Notes: *Use Kaleidoscope evaluation and EWISP Personal Interview - Judging Form **Please send all proposed bylaw amendments to Corporate Bylaws Committee at Kathy Scott @ mailto:35director@BallsFoods.com using the Proposed Bylaw Amendment paperwork located in the Resource Library. Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				


2026 May					Legend: Corporate Office Deadline Chapter Tasks All Representatives Attention to Date/Deadline Recommendations	
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
27	28	29	30	01 Encourage LCAM 2025 attendance. -Evaluate Straw Ballots received and begin preparing slate of officers for 2025-2026 board year	02	03
04	05 Deadline for submission of application for Corporate Board position*	06	07	08 Chapter EWISP and ASIST Judging closes	09 Notify EWISP/ASIST Winners	10
11	12	13 Chapter Leadership Call @ 12:00 PM CST	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29 Deadline to submit Chapter EWISP/ASIST Scholarship Winners to Corporate Office**	30	31
		Notes: *Email to members of the Corporate Nominating Committee and Nominating Committee Chair Kathy Scott at 35director@BallsFoods.com . **Email to ewi@ewiconnect.com Submit Chapter Notification of Winner Form. *** Each applicant submission must include a letter of recommendation from the Chapter President or Chapter Scholarship Chair stating why the student should receive a Corporate Scholarship Award on Chapter Letterhead - 300-600 words. Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com Month of May - Plan Chapter Awards Banquet for EWISP Winners and sponsoring Teachers; notify winners, sponsors and education providers of awards.				

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2026 June

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
01	02	03	04	05	06	07
08 Confirm due date: Present slate of Chapter Officers and Directors, and slate of Delegates and Alternates for acceptance by Chapter Board for upcoming year (2026-2027)	09	10 Chapter Leadership Call @ 12:00 PM CST	11	12 Corporate Scholarship Judging Period Opens	13	14
15	16	17	18	19	20	21
22	23 Confirm due date: Corporate Secretary to notify Chapters of number of Delegates and Votes per Chapter in Accordance with Bylaws	24	25	26	27	28
29	30 Corporate Scholarship Judging Period Closes	01	02	03	04	05
		Notes: Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2026 July				Legend: Corporate Office Deadline Chapter Tasks All Representatives Attention to Date/Deadline Recommendations		
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
29	30	01 LCAM 2026 Early bird pricing expires Present slate of Officers and Directors to Membership for Approval Due to Corporate Office-Chapter of Excellence submissions	02 Begin preparing Chapter Budget for 2026-2027 Operating Year	03	04	05
06	07 Chapters receive notification of Corporate EWISP/ASIST winners Due to the Corporate Office - Chapter nominations for Lucille Johnson Perkins Awards and Chapter Communications Awards to the Corporate Awards Committee*	08 Chapter Leadership Call @ 12:00 PM CST	09	10	11	12
13	14	15	16	17	18	19
20	21 Deadline for Notice of Annual Meeting: Chapters receive Annual Meeting Delegate Packets from Corporate Office (Not less than 60 Days prior to annual meeting)	22	23	24	25	26
27	28	29	30	31	01	02
Notes: *Email to ewi@ewiconnect.com ; Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com						

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2026 August



MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
27	28	29	30	31	01 <i>Chapter votes to determine if Delegates are 'informed and uninstructed' or 'informed and instructed'</i>	02
03	04 <i>Due to the Corporate Office: Student Verification of Enrollment (VOE) Forms to Submit Corporate Scholarship Award Payments to Schools</i>	05	06	07 <i>Due to the Corporate Office: Delegate Notification Form AND Fees (\$50 per delegate)*</i>	08	09
10	11	12 Chapter Leadership Call @ 12:00 PM CST	13	14 <i>2026 LCAM Annual Bylaw/Budget Delegate Session Conference Call - 12:00pm CT</i>	15	16
17	18	19	20	21	22	23
24	25	26	27	28 <i>Due to the Corporate Office: Corporate Notification of Chapter Officers and Directors for 2026-2027 (Form 40)*</i>	29	30
31	01	Notes: * Email to ewi@ewiconnect.com Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2026 September



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 Corporate Office Deadline
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MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	
31 Chapter President Elect to assist outgoing President with plans for installation mtg. Begin Year-End Financial Reports due to Corporate Office on 11/2/2026 Finalize plans for Reading Rally if holding one	01 Communications directors send holiday message to representatives and member firms	02	03	04 Annual Delegate Training Call – 12:00 PM CT	05	06	
07	08	09	10	11	12	13	
14	15 Chapter President-Obtain proper bank resolution from forms in the Resource Library for incoming Board for new officers to sign	16 2026 LCAM - Leadership Conference and Annual Meeting Mobile, Alabama				19	20
21	22	23	24	25	26	27	
28	29 Prepare for Board Retreat to include review of strategic plan, membership goals, and transfer of chapter files of new board members	30	01	02	03	04	
		Notes: 11/2/2026 - Due to the Corporate Office: 2026 YEAR-END Financial Reports-Annual Operating Financial Report along with Affiliate letter (letter to be placed on Chapter letterhead and signed by Chapter President), Annual B/C/DP Financial Report; B/C/DP Financial Review Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com					