

THE  
STARFLEET

“Organized  
Commander, STARFLEET”

Instruction Manual



# **THE ORGANIZED COMMANDER, STARFLEET HANDBOOK 2003 EDITION**

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Commander, STARFLEET – 2003-2004

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## **Introduction**

Greetings and welcome to the position of Commander, STARFLEET! Right now, you're probably asking yourself, "What have I gotten myself into?" There's no doubt that this position is not one to be taken lightly. This can, at times, be one of the most rewarding jobs in Fleet. Other times, it can drive you crazy. It can be a lot of fun, especially during Summit and IC season but it's also a tremendous amount of work. So much of what you need to do is virtually unseen and, to the general member, mostly unknown.

The most visible role you have is the head of our organization, overseeing the needs of our members. As chairman of the Admiralty Board (AB), you have final authority over Fleet administration and operation. One of the first items you need to address is updating the Membership Handbook (MHB) with any changes resulting from the election, such as amendments to the Constitution and any procedural changes resulting from them. As holder of the highest office in Fleet, you also have a responsibility to try and be available to meet the members. This includes making appearances at Summits, Region functions, chapter events, as well as the International Conference (IC). As the chairman of the Executive Committee (EC), you have the responsibility to make sure all the EC offices below you function well. It also includes making sure things like the Annual Awards process and the IC bid process are completed in a timely manner.

You are also responsible for administering five permanent, as well as any number of temporary, email lists. Naming and coordinating your staff is also a critical piece of any successful administration.

As president of our corporation, you have different and very specific financial and legal responsibilities to take care of. These cannot be put aside or forgotten. As dramatic as it may sound, Fleet's very existence as a not-for-profit corporation depends on you getting these things done in a correct and timely manner.

Some of these activities should be handled as soon as you get into office; the others give you a little time to breathe once you hit your desk. We'll go through them each in this manual.

In closing, a few pieces of advice... first, know the STARFLEET Constitution and Membership Handbook. They are your bibles. So many of the things you're going to be dealing with will concern these documents. They define your responsibilities and can answer many of the questions that will inevitably come up. Remember – the only true power in this organization is knowledge. Second, always remember that you represent this organization in every aspect. Be it online, in email, your Communiqué (CQ) articles or in public, what you do and say directly reflects on this organization. Finally, relax! Don't let the day-to-day details get you down. These next years can be your best in Fleet.

Have fun!

## What's First?

### Staffing

Your most important staffing decision was already made by the time you accepted your nomination – the choice of your right-hand. Your running mate, the Vice Commander, STARFLEET (VCS), should be one of your most trusted friends in Fleet. This is the person who will step in for you should you need to be away from the office for any reason. He/she should know as much as you do about what is going on and be able to seamlessly step into your shoes if the occasion arrives. He can also be your most important sounding board while you are in office. Keep him in the loop. Obviously, the rest of your EC has been chosen so we won't go into that but the rest of your departmental staff needs to be chosen just as carefully. Let's look at them, one at a time.

#### Chief of Staff

If the Vice Commander, STARFLEET is your right hand, then your Chief of Staff (CoS) is certainly your left. Other than the VCS, no other person in Fleet should know more about what is going on in your office. They can be the difference in your office being organized or not. They should be able to coordinate and oversee the rest of your staff. Normal duties include, but are certainly not limited to, overseeing the International Conference Bid Process, coordinating with the rest of the EC to prepare for the upcoming IC and reminding EC members about CQ deadlines, voting deadlines, etc., as well as coordinating all votes of the EC. They should also work hand in hand with the VCS' Chief of Staff to make sure that the CS and VCS are completely up to date as far as what is going on in each of these positions.

#### Awards Director

The Awards Director plays a critical role in recognizing the efforts of our members. The person in this role needs to be available, online, outgoing, preferably willing to get on stage and present awards, as well as being the chief cheerleader in getting the members of Fleet to participate. Their main function is to make sure the annual awards process goes smoothly so that awards can be ordered in time for presentation at the International Conference.

#### Inspector General

Your Inspector General (IG) will play a dual role in your administration. His main role will be to coordinate the biennial Vote of Confidence (VoC) for each sitting Region Coordinator (RC). He also conducts unscheduled VoCs when called for. His other, and thankfully less needed, role is that of STARFLEET's Chief Investigator. This person needs to have the ability to be completely impartial and to know when to pass it on to an assistant if a possible conflict of interest presents itself. For the first year of your term, you won't have to worry about this, as it renews on the first day of your second year but you need to keep this in mind so you can either resubmit him to the AB for approval or find a new one.

### Promotions Director

The Director of Promotions is also involved in recognizing the efforts of our members, this time through the advancement of rank. They coordinate the presentation of nominations to the EC, tally the votes, print out the promotion certificates and mail them to the appropriate parties. It's mandatory that this person has online access since the entire submission and voting process is done through email and the database.

### Quartermaster

The Quartermaster (QM) is the traveling salesman of Fleet, hawking our STARFLEET-branded wares like a Ferengi on amphetamines. This person needs to be someone who enjoys the spotlight, is outgoing, has the ability to keep meticulous records – both inventory and financial, can coordinate the ordering and delivery of updated stock and get this to as many Fleet functions as possible, with the IC being the main one.

These are the main members of your immediate staff - these five positions are the ones that should never be vacant long. Of course, you can create/have as many as you want. If you have a need for additional staffing, there's nothing preventing you from adding it. Just don't fall into the trap of creating a position for anyone who comes up with a cool idea. Your staff will get so bloated and cumbersome that you just may end up looking for a new Chief of Staff <G>.

## **Email Lists Memberships**

As Commander, STARFLEET, you have a minimum of five lists you'll be responsible for. The EC list, AB list, AB Vote list, EC/AB list and the Promotions list are critical lines of communication that need their membership updated periodically as staffing in both the EC and AB change throughout your term. You can, of course, have as many lists as you want to run things as you see fit. Many CS' have staff lists that include most everyone on any of the EC's staff. The outgoing CS will reset the passwords to a generic password and send you the links to the admin pages. At that time, you can reset the password and start adding any new or additional members to them. Here is the standard list of members for each list:

### EC List

All EC members plus the CS and VCS Chiefs of Staff

### AB List

All Admiralty Board members and the Commander, STARFLEET

### AB Vote List

All Admiralty Board members, the Commander, STARFLEET; Vice Commander, STARFLEET; the CS and VCS Chiefs of Staff and the Inspector General

### EC/AB List

All Executive Committee members, all EC Vice Chiefs, CS and VCS Chiefs of Staff, all AB members, all VRCs and the Inspector General

### Promotions List

All EC members and the Director of Promotions

One bit of advice on the email lists. Most every Region has one, if not more. Join them all. Sure, it'll result in a boatload of mail at times but it allows you to keep up with what's going on across the Fleet.

## **Corporate Responsibilities**

That's right, you're not just the leader of a Star Trek fan club, you are the president of a Federally recognized, 501(c)(7) not-for profit corporation. This means that you have some government and state-mandated financial and legal responsibilities you must take care of. I can't stress enough how important it is that you take these responsibilities seriously. Failure to do so in the past has cost us countless hours of legal work and nearly cost us thousands of dollars in IRS penalties. The following are the forms you need to send in:

### **IRS Forms**

As a not-for-profit organization, we are exempt from paying income tax. But, in order to maintain that exemption, there are specific forms that must be filed each year. They are as follows:

**Form 990EZ** – This is easily the most important form you are responsible for. Form 990 is the IRS tax return form for organizations exempt from income tax. Your Chief Financial Officer will provide you with all the numbers. All you do is fill it in and mail it out. This must be done and postmarked by the 15<sup>th</sup> of November each year. Failure to do so can and will result in the IRS telling us we owe them money – to the tune of thousands of dollars. It takes a lot of time and legal assistance to get this abated. Make sure you don't have to go down this road.

**Form 8868** – Should you run into an issue in which it becomes impossible to complete the Form 990 and submit it on time, you can file an extension. Form 8868 is the IRS Application for Extension of Time to File an Exempt Organization Return. Hopefully, you'll never need this form.

**Form 8822** – This is the IRS Change of Address form. You need to fill out Part II. This should be done in January of the first year of your administration.

All of these forms can be found as an editable .pdfs at [www.irs.com](http://www.irs.com)

### **State of North Carolina Forms**

Since we are incorporated in North Carolina, there are certain forms we need to send the North Carolina Secretary of State. They are as follows:

**Change of Principal Office** – This is North Carolina’s Change of Address form for the new president. It should be completed and sent in January of the first year of your administration. There is a \$5.00 filing fee.

**Articles of Amendment** – This is the form used to revise the Articles of Incorporation in the state of North Carolina. Article 4 may need to be changed but only if the Constitution has been amended since the last time this form was sent in. Article 10 will need to be changed to reflect the new Officers of the Corporation (the EC). This form should also be sent in January - or anytime there is a change on the EC - and has a \$25.00 filing fee.

**Change of Registered Agent** – Since STARFLEET’s Registered Agent needs to reside in North Carolina; our current Registered Agent is Les Rickard. Unless you plan to change agents (which there is no need to), you don’t need to send this form in. If you feel the need to change agents, you’ll need to use this form and include the \$5.00 filing fee when you send it in.

Les Rickard, as our Registered Agent, has copies of all of these North Carolina forms and will make them available to you upon request.

### **Commander, STARFLEET Responsibilities**

Yes, added to all the corporate and legal responsibilities that you have, you also have many duties to attend to as the top of the food chain in this organization. While quite a few of them span a lot of different areas simultaneously, I’ll try and break them down to manageable chunks.

#### **The Executive Committee**

As head of the organization, you are also head of the EC – but don’t let that go to your head. While you have final authority in regards to Fleet administration and operation, you can’t do this alone. Your fellow EC members should be your peers and not your subordinates. You are a team and should strive to function that way.

Taking that into consideration, you also need to make sure the EC doesn’t stall on issues and can come to consensus on the items brought before it. Everyone should participate in these discussions and, usually, the majority rules. Once the discussion has run its course, you are the one who calls for the vote and your CoS tallies it up.

You also have some specific responsibilities to the EC. First and foremost, get your CQ article in on time. Timely completion and delivery of the CQ is one of the primary functions of your Chief of Communications. Don’t make their department look bad by delaying your input.

Next, make sure you and your Chief Financial Officer (CFO) are always on the same page. This is critical in making sure that you have all the information necessary for those important forms by the deadline.

Also, keep up on your promotions votes. There's nothing more frustrating to a Promotions Director than nominations left open because one or two EC members haven't voted. Lead by example and stay on top of your votes.

Finally, keep in touch with your fellow EC members and be there for them. Be it via phone, email, IRC or face-to-face visits, try and keep up with what's going on with them. But, be careful not to micro-manage them. Watch their backs for them – you may need them to return the favor one day 😊

### The Admiralty Board

As Commander, STARFLEET, you are the chairman of the Admiralty Board. This is probably the most interesting and, at times, confusing working relationship in Fleet. The AB is the governing body of STARFLEET and the EC is the administrative body. The AB decides and approves matters of policy while the procedure to implement said policy is the purview of the EC. As chairman of the AB and head of the EC, you can be going in both directions simultaneously. But, not to fear, it's not near as complicated as it sounds.

Realistically, your primary function as chairman of the board is to oversee the day-to-day goings-on of the AB. You follow – and sometimes participate – in their discussions on the EC/AB list. When they have finished discussion on a certain issue, you call for a vote and the IG takes it to the AB Vote list. Once there, he will tally the votes and report to you the end result. It doesn't hurt for you to keep track of the votes, as well. Normal voting time is 30-45 days but it's usually over much quicker than that.

It's important that you have a good working relationship with the AB. They adopt and enforce the policies your EC recommends to them. They are the final authority in the interpretation of the Constitution. They represent the wants and needs of their constituents to you and the rest of the EC. Keep the lines of communications open here. It'll make your job a lot easier.

### Documents

STARFLEET is rich in documents. Virtually every facet of Fleet has a document of some type or other defining its purpose, scope and operating procedures. Without a doubt, the most important manual we have is the Membership Handbook. The MHB explains how the club is structured and operated. It's the member's guide to the features and functions of STARFLEET and governs all Fleet matters in conjunction with the Constitution. To many, this is their first view of how Fleet works. The EC and AB also use it regularly when questions about processes and procedures come up. It is an ever-changing and evolving document and, for this reason, it needs to be updated on a fairly regular basis.

At times, the update is nothing more than changing the welcome letter from the CS, found right after the Table of Contents. Other times, there are quite a few changes to be made. This is especially true if the STARFLEET Constitution has been amended. One thing to be aware of – the AB approves any and all updates and revisions to the MHB. The best way to handle that is to form an AB Committee to handle the overall revision. They go through the MHB, making all the changes then submit it to the rest of the AB for approval. The updated MHB then gets sent on to Membership Processing to use in the membership packets.

In a perfect world, your predecessor would have already formed this committee. But, with only 6 weeks left in the term and the holidays a week away by the time the election results are announced, it's an easy thing to have slip your mind. If you're not sure if this has been done, check with the AB. If it hasn't, get it started as soon as you can. Until the revision is approved, Membership Processing will continue to send out the previous administration's version – including the welcome letter from the previous CS.

### Deadlines

While you'll be dealing with many time frames and voting on a lot of things throughout your tenure as CS, there are two things that are deadline-critical to the membership, from a club point of view. These are the International Conference bids and the Annual Awards. Both of these items have announcements that need to be made concerning them at the current year's IC but decisions and notifications happen long before that.

### International Conference Bids

Each year, the EC is tasked with awarding the International Conference based upon bids received. Your first responsibility is to remind the membership of the deadline. This process usually starts right after the current year's IC and goes until the February 15<sup>th</sup> deadline the following year. In your first year, you'll want to do that right after you take office. As the new CS, you'll have a new CoS, so it is important to do this so that they know what address to send it to. The bidders send their bids (for the IC two years in the future) to your Chief of Staff. Once all the bids are in and the deadline has passed, the CoS gets them to all of the EC. With the bids in hand, you discuss the pros and cons of each, giving the CoS any questions you'd like them to direct back to the bidders. When all questions are answered to the satisfaction of the EC, you vote on who gets the IC. The CoS keeps track of the votes and informs the EC who has won the bid. After the decision is made, you then contact the future IC Chair by email. It's important to note that this decision is not to be made public until it's announced at the current year's IC. When contacting the chair, a simple email, such as the one below, usually does the trick:

*“Greetings <IC Chair name>!*

*I'm pleased to inform you that your bid for the <year> International Conference was the winning bid. On behalf of the EC, I want to thank you for the time you and your team put into this.*

*As is customary, this information is strictly confidential and is not to be publicly released*

*until I announce it at this year's IC. You can tell your senior staff but under no circumstances can this be broadcast.*

*Once again, congratulations!”*

You also have to inform those who's bids did not get accepted. Again, it needs to be made very clear that no one outside the process can be informed of the decision. In similar fashion, the following email should suffice:

*“Greetings <IC Chair name>!*

*I regret to inform you that your bid for the <year> International Conference was not the winning bid. On behalf of the EC, I want to thank you for the time you and your team put into this.*

*As is customary, this information is strictly confidential and is not to be publicly released until I announce the winner at this year's IC. You can tell your senior staff but under no circumstances can this be broadcast.*

*Once again, thanks for being a part of this process.”*

The only other thing left to do with this particular bid is to work with the CFO to cut the future IC a \$500 check for seed money. This helps cover the hotel deposit before the first pre-registrations come in.

### Annual Awards

For the Awards Director, the Annual Awards presentation at IC is the apex of their year. While there is a plethora of awards given out throughout the year, these are the big ones. While the IC is not at the same time every year, the deadline for submitting the annual award nominees is – April 30th. The main consideration for the deadline is to allow enough time to get the information to the company you are getting the awards from so that they are completed and delivered by IC. The responsibility for getting the word out to the membership belongs to your Awards Director and reminders should start around the beginning of each year.

Voting on the annual awards is a task the EC is charged with. What normally happens is that the Regions send their nominations based upon the recipients in their respective Regions. These nominations go to your Awards Director. Once all the bids are in and the deadline has passed, the Awards Director separates them out by category and sends all the nominations, per category, to the EC. Feel free to discuss the nominees amongst your peers. Once you have decided on your choices, send them to the Awards Director. After the decision is made, the Awards Director sends the pertinent information to the folks making the awards. It's important to note that this decision is not to be made public until it's announced at the IC.

The STARFLEET Cross

Another award given out is the STARFLEET Cross. This award is given out by the Commander, STARFLEET to those Marines who have rendered exceptional service to STARFLEET in general by demonstrating consistently outstanding performance over time or performing a particular task or service to a high standard of excellence. You will get nominations from any number of sources but you can also pick nominees yourself – this is *your* award to give out. There is no limit to how many you can hand out and they can be given out at any time. I saved mine until IC but the choice is yours.

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Obviously, this is not everything you're going to have to do or deal with but it encompasses the majority of the normal duties of the office. Situations will come up and unforeseen emergencies will arise. The trick is to make sure the things you must do get done when they need to be done so that you have the time to deal with everything else that may come up.

One more thing... This manual is written by a Commander, STARFLEET for future Commanders, STARFLEET or those aspiring to the job. Once in the job, please feel free to edit, add, delete or change anything necessary as duties, responsibilities and deadlines change. Remember, the more complete we can make this, the better prepared future leaders of this organization will be.



**Calendar and Deadline Schedule**

The following pages contain a run-down of the basic schedule of deadlines and activities you need to do during your term. It's broken down by year, then month to make keeping track of things a little easier. There are also check boxes so you can mark of the items you have completed. If you follow this month to month and execute the duties on time, that majority of your necessary items will be taken care of when they need to be.

# Commander, STARFLEET

## Official Deadline Schedule

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### Timeframe by year

#### Prior to 1<sup>st</sup> year in Office

- November
  - Check with current CS about MHB committee
  - Give current CS mailing info for CS files
  - Gather email addresses of staff for email lists
  - Join Region lists if you aren't already on them
  - Prepare a staff listing for the CQ and sfi.org
  
- December
  - Prepare first email as CS to be sent January 1
  - Get staff added to EC and AB staff lists
  - Get generic passwords to all email lists from CS
  - Prepare North Carolina forms for mailing in January
  - Prepare IRS Form 8822 for mailing in January
  - Prepare and submit welcome letter for MHB
  - Get with current CFO for new signature cards

# Commander, STARFLEET

## Official Deadline Schedule

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### Year 1

- January
  - Send first email as CS
  - Remove old staff from EC and AB staff lists
  - Change passwords to lists
  - Send forms to North Carolina
  - Send Form 8822 to IRS
  - Send first CQ article as CS
  - Send reminder about IC bids with CoS contact info
  - Have Awards Director send out first Int'l awards reminder
  
- February
  - Make sure awards reminder is sent out
  - IC bid reminder (Feb 15<sup>th</sup> deadline)
  
- March
  - Make sure awards reminder is sent out
  - Choose IC bid winner
  - Inform both winning and losing bids
  - Send CQ article
  
- April
  - Get with CoS to start getting EC agenda items for IC
  - Awards Director does final Int'l Awards reminder
  - April 30<sup>th</sup> is the deadline for Int'l Awards
  
- May
  - Int'l Awards submissions due
  - Send CQ article
  - Get with CoS to start getting AB agenda items for IC
  
- June
  - Vote on Int'l Awards
  - Send award winners to Plaque Company
  - Work with CoS to finish IC agenda
  - Compile and print STARFLEET Cross Awards
  - Prepare for IC
  - Fiscal Year ends

# Commander, STARFLEET

## Official Deadline Schedule

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### Year 1

- |                                    |   |
|------------------------------------|---|
| <input type="checkbox"/> July      | <input type="checkbox"/> Finish prep/attend IC<br><input type="checkbox"/> Send CQ article (right after IC if deadline permits)<br><input type="checkbox"/> Work with CFO to start on IRS Form 990<br><input type="checkbox"/> Prepare for annual CPA review of books |
| <input type="checkbox"/> August    | <input type="checkbox"/> Ship any Int'l awards to recipients not at IC<br><input type="checkbox"/> Have annual CPA review of books done<br><input type="checkbox"/> Continue work on IRS Form 990   |
| <input type="checkbox"/> September | <input type="checkbox"/> Send CQ article<br><input type="checkbox"/> Finish work on IRS Form 990  |
| <input type="checkbox"/> October   | <input type="checkbox"/> Send IRS Form 990  |
| <input type="checkbox"/> November  | <input type="checkbox"/> Send CQ article  |
| <input type="checkbox"/> December  | <input type="checkbox"/> Relax and prepare for year 2   |

# Commander, STARFLEET

## Official Deadline Schedule

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### Year 2

- January
  - Update staff on EC and AB staff lists
  - Send CQ article
  - Send reminder about IC bids with CoS contact info
  - Have Awards Director send out first Int'l awards reminder
  
- February
  - Make sure awards reminder is sent out
  - IC bid reminder (Feb 15<sup>th</sup> deadline)
  
- March
  - Make sure awards reminder is sent out
  - Choose IC bid winner
  - Inform both winning and losing bids
  - Send CQ article
  
- April
  - Get with CoS to start getting EC agenda items for IC
  - Awards Director does final Int'l Awards reminder
  - April 30<sup>th</sup> is the deadline for Int'l Awards
  
- May
  - Int'l Awards submissions due
  - Send CQ article
  - Get with CoS to start getting AB agenda items for IC
  
- June
  - Vote on Int'l Awards
  - Send award winners to Plaque Company
  - Work with CoS to finish IC agenda
  - Compile and print STARFLEET Cross Awards
  - Prepare for IC
  - Fiscal Year ends

# Commander, STARFLEET

## Official Deadline Schedule

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### Year 2

- |                                    |   |
|------------------------------------|---|
| <input type="checkbox"/> July      | <input type="checkbox"/> Finish prep/attend IC<br><input type="checkbox"/> Send CQ article (right after IC if deadline permits)<br><input type="checkbox"/> Work with CFO to start on IRS Form 990<br><input type="checkbox"/> Prepare for annual CPA review of books |
| <input type="checkbox"/> August    | <input type="checkbox"/> Ship any Int'l awards to recipients not at IC<br><input type="checkbox"/> Have annual CPA review of books done<br><input type="checkbox"/> Continue work on IRS Form 990   |
| <input type="checkbox"/> September | <input type="checkbox"/> Send CQ article<br><input type="checkbox"/> Finish work on IRS Form 990  |
| <input type="checkbox"/> October   | <input type="checkbox"/> Send IRS Form 990  |
| <input type="checkbox"/> November  | <input type="checkbox"/> Send CQ article  |
| <input type="checkbox"/> December  | <input type="checkbox"/> Relax and prepare for year 3   |

# Commander, STARFLEET

## Official Deadline Schedule

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### Year 3

- January
  - Update staff on EC and AB staff lists
  - Send CQ article
  - Send reminder about IC bids with CoS contact info
  - Have Awards Director send out first Int'l awards reminder
  
- February
  - Make sure awards reminder is sent out
  - IC bid reminder (Feb 15<sup>th</sup> deadline)
  
- March
  - Make sure awards reminder is sent out
  - Choose IC bid winner
  - Inform both winning and losing bids
  - Send CQ article
  
- April
  - Get with CoS to start getting EC agenda items for IC
  - Awards Director does final Int'l Awards reminder
  - April 30<sup>th</sup> is the deadline for Int'l Awards
  
- May
  - Int'l Awards submissions due
  - Send CQ article
  - Get with CoS to start getting AB agenda items for IC
  
- June
  - Vote on Int'l Awards
  - Send award winners to Plaque Company
  - Work with CoS to finish IC agenda
  - Compile and print STARFLEET Cross Awards
  - Prepare for IC
  - Fiscal Year ends

# Commander, STARFLEET

## Official Deadline Schedule

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### Year 3

- July
  - Finish prep/attend IC
  - Send CQ article (right after IC if deadline permits)
  - Work with CFO to start on IRS Form 990
  - Prepare for annual CPA review of books
  
- August
  - Ship any Int'l awards to recipients not at IC
  - Have annual CPA review of books done
  - Continue work on IRS Form 990
  
- September
  - Send CQ article
  - Finish work on IRS Form 990
  
- October
  - Send IRS Form 990
  
- November
  - Send final CQ article as CS
  - Form MHB Committee to prep for new Administration
  - Prepare and pack files to send to new CS
  
- December
  - Set up generic passwords to all email lists
  - Send files to new CS
  - Relax and prepare for retirement