

President Onboarding Guide

*A Practical Resource for Incoming Presidents
of Alberta Nonprofit Organizations*

2026 Edition | Prepared by Guardian Accounting

Empowering Leaders. Protecting Organizations.

This guide is intended for the exclusive use of the incoming President and authorized board members. It should be read alongside the organization's bylaws, strategic plan, and most recent audited financial statements.

Companion document: Guardian Accounting Treasurer Onboarding Guide (2026 Edition)

Governing jurisdiction: Province of Alberta, Canada

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Organizations.**

1. Welcome from Guardian Accounting

Congratulations on your election as President. Taking on this role is one of the most meaningful contributions a volunteer can make to the nonprofit sector — and we at Guardian Accounting recognize the trust your fellow board members and your community have placed in you.

Guardian Accounting provides specialized accounting and governance advisory services exclusively to Alberta nonprofit organizations. Our work supports boards like yours with financial compliance, fiduciary oversight, year-end reporting, and leadership transition — ensuring that your organization remains in good standing and that your board can focus on what matters most: mission, strategy, and community impact.

This guide has been designed as a companion to the **Guardian Accounting Treasurer Onboarding Guide** and mirrors its structure and philosophy: practical, checklist-driven, and grounded in Alberta's legal and regulatory reality. It is not intended to replace professional legal or accounting advice — rather, it equips you with the knowledge and frameworks to ask the right questions, engage the right professionals, and lead your board with confidence.

How to Use This Guide

Read this guide alongside your organization's **bylaws, strategic plan, and most recent audited financial statements**. Cross-reference with the Treasurer Onboarding Guide for financial and compliance detail. Return to Section 10 (the 90-Day Onboarding Sequence) regularly during your first three months.

We are honoured to support your organization and look forward to working with you throughout your term. Do not hesitate to reach out to your Guardian Accounting contact at any time — governance questions are never an inconvenience.

— The Team at Guardian Accounting

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2. Role of the President — Governance Overview

2.1 Governance vs. Management: The Essential Distinction

The single most important principle for any new President to internalize is the distinction between **governance** and **management**:

Governance (The Board's Role)	Management (The ED's / Staff's Role)
Sets strategic direction and organizational priorities	Implements strategy through programs and operations
Approves policies, budgets, and major decisions	Manages day-to-day financial transactions and staffing
Oversees and evaluates the Executive Director	Supervises and directs all other staff and volunteers
Ensures legal compliance and fiduciary integrity	Delivers programs and services to the community
Represents the organization to external stakeholders	Manages external relationships at the operational level

The President leads the **board** — not the organization's staff or day-to-day operations. This distinction protects the Executive Director's authority and maintains healthy governance structures.

2.2 Core Responsibilities of the President

- **Chairing board and AGM meetings** — setting agendas, facilitating productive discussion, ensuring decisions are properly recorded

- **Serving as signing authority** — co-signing with the Treasurer for contracts, grant agreements, banking resolutions, and documents above board-approved thresholds
- **Representing the organization** — to funders, government, partner organizations, media, and the public
- **Supporting and evaluating the Executive Director** — the President is the ED's primary board contact and leads the annual performance review
- **Ensuring fiduciary duty** — the board's duty of care, loyalty, and obedience flows through the President's leadership
- **Leading strategic planning oversight** — ensuring the board approves, monitors, and updates the strategic plan
- **Managing board composition and succession** — leading recruitment, nomination, and succession planning for board directors

2.3 Alberta-Specific Legal Context

In Alberta, most nonprofit organizations are incorporated under the *Societies Act* (RSA 2000, c. S-14), which imposes specific obligations on directors and officers regarding annual general meetings, annual return filings, and bylaw amendments. Where applicable, organizations may also be governed by the *Companies Act* (RSA 2000, c. C-21) or the *Nonprofit Organizations Act*.

As President, you play a central role in ensuring the organization remains in **good standing with Service Alberta**, including filing annual returns on time, holding AGMs within required timeframes, and filing any bylaw amendments or director changes within statutory deadlines.

Alberta Societies Act — Key Obligation

Under the *Societies Act*, the annual return must be filed with Service Alberta within six months of the organization's fiscal year-end. Failure to file can result in the society being struck from the register. The President should confirm with the ED or Treasurer that this filing is on track each year.

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3. Legal & Compliance Obligations (Alberta Nonprofit Context)

The following table summarizes the principal compliance obligations applicable to Alberta nonprofit organizations, the governing legislation or body, the expected frequency, and the President's specific role in each obligation.

Obligation	Governing Body / Legislation	Frequency	President's Role
Annual General Meeting (AGM)	<i>Societies Act</i> / Bylaws	Annually	Chair the AGM; ensure proper notice is given to members and quorum is achieved; present the annual report
Annual Return Filing	Service Alberta	Within 6 months of fiscal year-end	Ensure ED/Treasurer files on time; sign if required by the registry; confirm good standing
Board Meeting Quorum & Minutes	Bylaws	Per meeting schedule	Chair all board meetings; ensure quorum is confirmed; approve minutes at the subsequent meeting
Signing Authority for	Bylaws / Banking Resolution	As required	Co-sign contracts, agreements, and

Obligation	Governing Body / Legislation	Frequency	President's Role
Contracts			banking instruments above the board-approved threshold with the Treasurer
CRA Charity Annual Information Return (T3010)	Canada Revenue Agency	Within 6 months of fiscal year-end	Ensure filing is on track; review key sections before submission; confirm charitable registration remains in good standing
Society Amendment Filings	Service Alberta	As required	Sign bylaw amendment applications; ensure member approval was obtained at a duly constituted meeting
Directors & Officers Insurance Renewal	Insurer	Annually	Confirm coverage is adequate for board size, activities, and risk exposure; escalate gaps to the board
Strategic Plan Review	Board	Annually	Lead or facilitate the annual strategic planning process; ensure board approval of updated priorities
Executive Director Performance Review	Board	Annually	Lead the review process using pre-agreed goals; present the outcome to the board in camera
Conflict of Interest Declarations	Bylaws / Policy	Annually + as needed	Collect signed declarations from all directors; model transparency by completing your own declaration first; manage disclosures at meetings

Tip — Compliance Calendar

Use Section 12 of this guide (President's Annual Compliance Cycle) as a month-by-month reference to ensure no obligation falls through the cracks during your term.

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4. Signing Authority & Financial Oversight

4.1 Signing Authority Overview

As President, you share signing authority with the Treasurer for the organization's most significant financial and legal instruments. This shared responsibility is a critical internal control — it ensures no single individual can commit the organization unilaterally on matters of substance.

The President typically co-signs with the Treasurer for the following:

- Cheques and electronic funds transfers (EFTs) above the board-approved signing threshold
- Contracts and legal agreements entered into by the organization
- Grant applications and multi-year funding agreements
- Banking resolutions, account changes, and investment instructions
- AGM documents and annual return submissions (where signatures are required)
- Bylaw amendments submitted to Service Alberta

Important — Scope of the President's Financial Role

The President does **NOT** manage day-to-day finances — that is the Treasurer's domain. The President's role is governance oversight: asking the right questions and ensuring that proper financial controls exist and are being followed. Signing authority is a safeguard, not an invitation to manage operations.

4.2 Quarterly Financial Questions for the President to Ask

At each board meeting, the President should ensure the Treasurer's financial report addresses the following key questions. If these questions are not answered proactively, the President should ask them directly:

- Is the organization operating within its approved annual budget, and are there material variances to explain?
- Are there any cash flow concerns, liquidity issues, or unexpected expenditures on the horizon?
- Have all statutory remittances — including payroll source deductions, GST/HST — been filed and remitted on time?
- Is the annual audit or review engagement on track, and are there any anticipated findings or concerns?
- Are signing authority procedures being followed consistently by all authorized signatories?
- Are there any outstanding receivables (grants, memberships, donations) that pose a financial risk?

4.3 First 30 Days: Financial Policy Review

Within your first 30 days as President, you should request and review the following financial governance documents from the Treasurer or ED:

- Current signing authority policy and banking resolution
- Most recent audited or reviewed financial statements

- Current-year operating budget (approved by the board)
- Expense reimbursement and procurement policies
- Investment or reserve fund policy (if applicable)
- Any outstanding audit management letter points or recommendations

Cross-Reference

For full detail on financial oversight, internal controls, and Treasurer responsibilities, refer to the **Guardian Accounting Treasurer Onboarding Guide (2026 Edition)**.

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5. Meeting Cadence & Board Leadership

5.1 Recommended Annual Meeting Schedule

Meeting Type	Typical Timing	President's Role	Key Outputs
Regular Board Meetings	Monthly or bi-monthly	Chair; set agenda jointly with ED	Recorded minutes, formal decisions, assigned action items with owners and due dates
Annual General Meeting (AGM)	Within 6 months of fiscal year-end	Chair; present annual report to members	Election of directors, approval of financial statements,

Meeting Type	Typical Timing	President's Role	Key Outputs
			appointment of auditor/reviewer
Strategic Planning Session	Annually (often fall)	Facilitate or engage external facilitator	Updated strategic priorities, multi-year goals, and board-approved plan amendments
Executive Committee Meetings	As needed	Chair	Time-sensitive decisions between full board meetings; ratified at next board meeting
President-ED Check-ins	Monthly	Participate; support and listen	ED briefing, early issue identification, relationship investment
Committee / Task Force Updates	Per committee schedule	Receive reports; provide direction	Board-level decisions on committee recommendations
Funder / Stakeholder Meetings	As required	Represent the organization alongside ED	Relationship stewardship, strategic alignment with funders

5.2 Tips for Running Effective Board Meetings

Effective board meetings do not happen by accident — they are the product of disciplined preparation and skilled facilitation. As President and chair, you set the tone:

- **Distribute the agenda 7 days in advance** — including supporting materials. Board members cannot make good decisions without adequate preparation time.
- **Use a consent agenda** for routine items (previous minutes, routine reports) — bundle them for a single approval motion to preserve discussion time for substantive matters.
- **Maintain a parking lot** — capture off-agenda items without derailing the meeting; address them at a future meeting or between sessions.

- **Time-box discussions** — assign approximate times to agenda items and enforce them respectfully. A president who loses control of time loses credibility.
- **End every item with clarity** — who is responsible, what will they do, and by when. Ambiguous outcomes waste everyone's time.
- **Distribute approved minutes within 7 days** — timely minutes reinforce accountability and create a reliable record.
- **Create space for dissenting voices** — healthy boards welcome debate. Silence does not equal consensus.

Best Practice — In Camera Sessions

Reserve time at the end of each board meeting for a brief *in camera* session (without the ED present) for the board to discuss sensitive matters such as the ED's performance, compensation, or conflicts of interest. This is normal governance practice and should not be made to feel punitive or unusual.

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6. Strategic Plan Integration

The strategic plan is the board's primary governance tool. It translates the organization's mission and values into concrete, time-bound priorities that give the entire organization — board, staff, and volunteers — a shared direction.

6.1 The President's Strategic Responsibilities

- Ensure the board formally approves the strategic plan and reviews it at least annually
- Connect every significant board decision back to the organization's strategic priorities — use the plan as a filter
- Lead or co-lead the annual strategic planning process, engaging all board members and the ED meaningfully
- Ensure the ED's annual work plan and key performance indicators (KPIs) are explicitly aligned with strategic plan goals
- Report progress against strategic priorities to members at the AGM
- Initiate a formal strategic plan refresh every three to five years, or sooner if the operating environment changes significantly

Governance Red Flag

Strategy is the board's primary job. Operations are the ED's job. If your board spends more time discussing operational details — program scheduling, staffing decisions, procurement — than it does on strategic direction, financial oversight, and governance, that is a governance red flag that requires the President's intervention.

6.2 Quarterly Board Dashboard

A simple quarterly dashboard helps the board track organizational health at a glance without drowning in operational detail. Guardian Accounting recommends a four-category RAG (Red/Amber/Green) status dashboard:

Category	What to Monitor	RAG Status Example
Mission & Programs	Program delivery against targets; client/participant outcomes; strategic goal progress	● Green — On track ● Amber — Watch ● Red — Action needed
Financial Health	Budget vs. actuals; cash	● Green — On track ●

Category	What to Monitor	RAG Status Example
	flow; reserve levels; audit status; upcoming filing deadlines	Amber — Watch Red — Action needed
People & Culture	Staff retention and morale; volunteer engagement; ED wellbeing; board attendance and participation	Green — On track Amber — Watch Red — Action needed
External Relations	Funder relationships; community reputation; partnership health; media/public perception	Green — On track Amber — Watch Red — Action needed

The ED prepares the dashboard; the President presents it to the board and facilitates discussion on any Amber or Red items. This keeps governance conversations focused and data-driven.

Tip — Strategic Coherence

Before any significant board decision, ask: *"How does this advance our strategic plan?"* If no one can answer clearly, the item may not be ready for board consideration — or the strategic plan may need updating.

7. Executive Director Relationship & Performance Management

The President is the ED's primary point of contact with the board. This relationship — more than almost any other factor — determines the health and effectiveness of the entire organization. It requires deliberate investment, clear communication, and consistent mutual respect.

7.1 Key Principles for the President-ED Relationship

- **Support without micromanaging** — trust the ED to manage operations. Your role is to ask good questions, not to direct staff activities.
- **Communicate clearly and consistently** — the ED should never be surprised by board sentiment. Regular check-ins prevent this.
- **Shield the ED from individual board member interference** — all board direction to the ED flows through the President. Individual directors do not have authority to direct the ED; the board speaks with one voice.
- **Conduct an annual performance review** — using goals agreed upon at the start of the year, aligned to the strategic plan. Informal feedback throughout the year is also essential.
- **Celebrate successes publicly** — acknowledge the ED's achievements to the full board and, where appropriate, to members and stakeholders.

Foundational Principle

A strong President-ED relationship is the single biggest predictor of organizational health. Invest in it deliberately. Schedule regular check-ins, be accessible, and be candid — with warmth. A well-supported ED leads a well-functioning organization.

7.2 Annual ED Performance Review Process

Step	Action	Who	Timing
Step 1	Agree on annual performance goals aligned to the strategic plan	President + ED + Board	Start of fiscal year

Step	Action	Who	Timing
Step 2	Mid-year informal check-in — progress, obstacles, adjustments needed	President + ED	Mid-year (Month 6)
Step 3	ED completes written self-assessment against agreed goals	ED	Month 11
Step 4	Board committee (or full board) gathers 360° feedback from key stakeholders and board members	President + Governance Committee	Month 11–12
Step 5	President leads the formal review conversation with the ED	President (+ 1 other director if preferred)	Month 12
Step 6	Board approves outcomes (rating, compensation adjustment if applicable) in camera	Full Board	Month 12 board meeting

Important — Confidentiality

The ED's performance review is a confidential board matter. Results, deliberations, and compensation decisions must not be shared outside the board. All board members must maintain this confidentiality as a matter of fiduciary duty.

8. Risk Oversight

The President chairs the board's risk oversight function — whether or not a formal Risk Committee exists. Risk oversight does not mean eliminating all risk; nonprofits that take no risks rarely fulfill their missions. It means ensuring the board is **aware** of key risks and that management has **adequate mitigation strategies** in place.

8.1 Key Risk Categories

Risk Category	Examples	Board's Role
Financial Risk	Cash flow crisis, fraud or misappropriation, significant audit findings, over-reliance on a single funder	Review financial statements quarterly; ensure internal controls are in place; require dual signing on significant transactions
Governance Risk	Quorum failures, unmanaged conflicts of interest, bylaw non-compliance, director liability exposure	Enforce governance policies; maintain adequate board composition; ensure D&O insurance is current
Operational Risk	Key staff turnover, program delivery failures, volunteer capacity issues, technology failure	Monitor via ED reports; ensure management has succession and continuity plans
Reputational Risk	Public controversy, social media incidents, complaints about programs or staff conduct	Ensure a crisis communication plan and media policy exist; President is the spokesperson in a crisis
Legal / Regulatory Risk	Missed statutory filings, CRA compliance failures, employment law disputes, privacy breaches	Annual compliance checklist (see Section 12); maintain access to legal counsel; never ignore regulatory correspondence
Strategic Risk	Mission drift, over-dependence on restricted funding, sector disruption, loss of community relevance	Annual strategic review; funding diversification strategy; environmental scan as part of planning

8.2 The Risk Register

Guardian Accounting recommends that every nonprofit board maintain a **Risk Register** — a living document that identifies key organizational risks, assesses their

likelihood and potential impact, and records the mitigation strategies in place for each. The Risk Register should be:

- Reviewed by the full board at least semi-annually (suggest: spring and fall)
- Updated by the ED and Finance Committee between reviews
- Presented alongside the quarterly financial dashboard as part of standard board reporting
- Treated as a board-level document — not simply an operational management tool

Perspective — What Risk Oversight Really Means

Risk oversight is not about eliminating risk — it is about ensuring the board is aware of key risks facing the organization and that management has adequate, proportionate mitigation strategies in place. A board that never discusses risk is not a low-risk organization; it is a board that does not know what it does not know.

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9. Board Composition, Recruitment & Succession

One of the President's most strategic responsibilities — and the one most frequently neglected — is ensuring the board has the right people, with the right skills, engaged at the right level. A high-performing board does not happen by accident; it requires ongoing, intentional stewardship by the President.

9.1 Annual Board Self-Assessment

Each year, the President should lead a board self-assessment that covers three dimensions:

- **Skills matrix** — compare current board members' professional competencies against the skills needed to govern the organization effectively (e.g., finance, law, HR, marketing, sector expertise, lived experience)
- **Diversity audit** — assess whether the board reflects the communities and populations the organization serves; identify gaps in representation
- **Engagement review** — attendance records, committee participation, quality of preparation and contribution at meetings

9.2 Director Recruitment Process

1. Use the skills matrix to identify the most critical competency gaps on the board
2. The Nominating Committee (or full board, if no committee exists) develops a profile for the ideal candidate
3. Identify and approach prospective candidates through professional networks, community referrals, or sector associations such as the Alberta Nonprofit Network
4. Vet all candidates for potential conflicts of interest and alignment with the organization's mission and values
5. For elected positions: present candidates to members at the AGM for election per bylaw requirements; for appointed positions: follow the bylaw process for mid-term appointments
6. Provide comprehensive onboarding for all new directors — including this guide and the Treasurer Onboarding Guide (for the incoming Treasurer)

9.3 Presidential Succession Planning

One of the most important contributions any President makes is preparing for their own succession. Without a plan, leadership transitions become organizational crises.

- Identify a potential President-Elect or Vice-President at least **one year in advance** of the expected transition
- Build in an **overlap or shadowing period of three to six months** — the incoming President attends key meetings, co-signs documents, and gradually assumes responsibilities
- Document institutional knowledge: key contacts, funder relationships, historical context, governance nuances — this guide is part of that documentation
- Ensure the outgoing President is available for questions for at least 90 days post-transition
- Present the succession plan to the full board for discussion and approval

The Best Gift an Outgoing President Can Give

The best gift an outgoing President can give the organization is a well-prepared, well-supported successor. This means investing in mentorship during the transition, not simply stepping aside. Organizations that plan presidential succession thoughtfully are dramatically more resilient than those that do not.

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10. 90-Day President Onboarding Sequence

The first 90 days as President set the tone for your entire term. Use the three-phase checklist below as your roadmap. Aim to complete each phase within the indicated timeframe. Check off items as they are completed and flag any that require follow-up or escalation.

Phase 1: First 30 Days — Orient

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Connect

- ☐ Obtain and thoroughly review governing documents: bylaws, all board policies, current strategic plan, and most recent audited or reviewed financial statements
- ☐ Schedule and complete individual introductory meetings (15–30 minutes) with each board member — understand their backgrounds, motivations, and perspectives on organizational priorities
- ☐ Meet with the Executive Director — learn current organizational priorities, operational pressures, immediate opportunities, and any unresolved concerns
- ☐ Review board meeting minutes from the past 12 months — understand what decisions have been made and what action items remain outstanding
- ☐ Confirm signing authority arrangements with the Treasurer and the organization's bank — ensure your signature is on file and the banking resolution reflects current signatories
- ☐ Review Directors & Officers (D&O) insurance coverage — confirm the policy is current, the coverage limits are adequate, and all directors are named
- ☐ Obtain a copy of the current organizational chart — understand the staffing structure and reporting relationships

- ☐ Confirm the annual board meeting schedule and all key dates: next AGM, audit or review engagement timeline, filing deadlines with CRA and Service Alberta
- ☐ Review all outstanding action items from previous board meeting minutes — confirm ownership and status of each item
- ☐ Confirm the identity of the organization's legal counsel, external auditor or accountant, and key funders — introduce yourself where appropriate
- ☐ Complete (or confirm completion of) your annual conflict of interest declaration — model transparency for the rest of the board

Phase 2: Days 31–60 — Understand

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Assess

- ☐ Review the most recent strategic plan progress report — understand where the organization stands against its stated goals
- ☐ Request and review the current-year budget vs. actuals from the Treasurer — identify any material variances or areas of concern
- ☐ Chair your first board meeting as President — set a deliberate, professional tone; demonstrate the meeting culture you intend to foster
- ☐ Review the ED's current annual work plan and key performance indicators — confirm alignment with the strategic plan
- ☐ Assess the effectiveness of recent board meetings — quality of agendas, level of director participation, clarity of decision-making
- ☐ Review the existing board committee structure and all committee terms of reference — confirm committees are functioning as intended

- ☐ Identify any immediate governance gaps or emerging risks — document and prepare to raise with the full board
- ☐ Confirm the organization's CRA charitable registration status (if applicable) and good standing with Service Alberta
- ☐ Begin planning the next strategic planning session if it falls within the next six months
- ☐ Establish a regular monthly check-in cadence with the ED — schedule recurring meetings in both calendars

Phase 3: Days 61–90 — Establish

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Lead

- ☐ Facilitate or lead a board self-assessment or planning discussion — use the skills matrix and engagement review framework from Section 9
- ☐ Establish or refresh board committee assignments — ensure all directors have meaningful committee roles aligned with their skills
- ☐ Present a brief "President's Priorities" statement to the full board — communicate your governance focus areas and expectations for the year ahead
- ☐ Initiate the ED goal-setting process for the year ahead — align goals explicitly with the strategic plan
- ☐ Review and update the Risk Register with the board — ensure key risks are identified, assessed, and assigned to management for mitigation
- ☐ Confirm the succession plan — identify a potential Vice-President or President-Elect and begin deliberate knowledge transfer

- ☐ Schedule the upcoming AGM and confirm all statutory requirements are being tracked (notice requirements, quorum, agenda items, auditor appointment)
- ☐ Connect with key external stakeholders: major funders, strategic partner organizations, and relevant government contacts
- ☐ Debrief with the outgoing President (if available and willing) — capture institutional knowledge, relationship context, and lessons learned
- ☐ Confirm the Guardian Accounting engagement and scope of services with the Treasurer — ensure you understand what support is available and how to access it

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11. Key Contacts & Resources

The following table provides a reference list of key contacts and resources relevant to an Alberta nonprofit President. Update organization-specific contacts using your board records and onboarding materials from the ED.

Resource	Contact / Source	Notes
Guardian Accounting	As provided by your board	Your organization's accounting and governance advisor; contact for questions on financial oversight, compliance, board governance, and this guide

Resource	Contact / Source	Notes
Service Alberta — Corporate Registry	servicealberta.ca	Annual return filing, society amendments, director change filings, good standing certificates; primary registry for Alberta societies
CRA Charities Directorate	canada.ca/charities	T3010 Annual Information Return filing, charitable registration status, revocation and compliance matters; call 1-800-267-2384
Alberta Nonprofit Network (ANN)	albertanonprofit.ca	Alberta-specific sector resources, governance training, board development tools, policy advocacy, and community of practice
Imagine Canada	imaginecanada.ca	National nonprofit resources; Standards Program accreditation for organizational excellence; sector data and research
Organization's Legal Counsel	As per board records	Bylaw interpretation, contract review and drafting, employment law advice, regulatory compliance; consult before signing unfamiliar agreements
Organization's Auditor / Accountant	As per board records	Preparation of annual financial statements, T3010 preparation, financial controls advice; primary financial professional advisor to the board
Directors & Officers Insurer	As per current policy documents	D&O coverage questions, claims process, policy renewal; ensure the President's name is included as a covered officer

11.1 Additional Alberta Nonprofit Resources

- **Board Source** (boardsource.org) — internationally recognized nonprofit governance tools, board assessments, and leadership resources

- **Institute of Corporate Directors (ICD)** (icd.ca) — director education programs; the NFP Governance Essentials Program is specifically designed for nonprofit directors
- **Volunteer Alberta** (volunteeralberta.ab.ca) — volunteering and board recruitment resources for Alberta organizations
- **Alberta Culture and Status of Women** — provincial grants, gaming licensing, and support programs for Alberta nonprofits

Reminder — Update This Table

Ensure the organization-specific rows in this table (Legal Counsel, Auditor/Accountant, D&O Insurer) are completed with current contact details and stored alongside this guide in the board's governance records. Review contacts annually.

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12. President's Annual Compliance Cycle

The calendar below maps the key governance and compliance obligations across a typical year, based on a **March 31 fiscal year-end**. If your organization has a different fiscal year-end, shift the calendar accordingly. Use this as a standing agenda reference throughout your term.

Month	Key Activity	Primarily Responsible	President's Action
April	Fiscal year-end; engage or confirm external auditor / reviewer; confirm T3010 preparation timeline	ED + Treasurer + Auditor	Confirm audit is engaged and timeline is on track; raise at April board meeting
May	Review draft financial statements with Treasurer; begin AGM preparation; draft annual report	President + Treasurer + ED	Review draft financials; approve AGM agenda and notice; prepare President's report for AGM
June	Annual General Meeting (within 6 months of March 31 fiscal year-end); T3010 filing; Annual Return to Service Alberta	President chairs AGM; Treasurer/ED file with CRA and Service Alberta	Chair the AGM; confirm filings are submitted; sign Service Alberta return if required
July	New director onboarding (directors elected at AGM); confirm board committee assignments for coming year	President + ED	Lead new director orientation; confirm committee structure and chairs for the year
August	Strategic planning session (if fall timing; adjust if spring); ED mid-year check-in	President + Full Board + ED	Lead or facilitate strategic planning session; conduct or confirm mid-year ED check-in
September	Strategic plan update finalized and approved by board; budget development process begins	ED + Finance Committee	Confirm board approves updated strategic plan; confirm budget development is underway
October	Board approves operating budget for next fiscal year (beginning April 1); confirm D&O insurance renewal	President + Board + Treasurer	Facilitate budget approval at board meeting; confirm D&O policy renewed with adequate coverage
November	Conflict of interest declarations renewed by all directors; year-end donor acknowledgement	President + All Board Members	Distribute and collect signed conflict of interest declarations; complete your own declaration first

Month	Key Activity	Primarily Responsible	President's Action
	review (if charitable)		
December	Annual board self-assessment; confirm AGM date for the following year; review signing authorities	President + Board	Lead board self-assessment process; confirm AGM is calendared and statutory notice requirements are understood
January	Mid-year financial review (Q3 financials); confirm audit/review engagement is on track for March 31 year-end	Treasurer + President	Review Q3 financial report at board meeting; confirm auditor engagement timeline; identify any cash flow concerns
February	ED annual performance review process initiated; ED self-assessment distributed	President	Launch formal review process; distribute ED self-assessment template; begin gathering board feedback
March	ED annual performance review complete; fiscal year-end preparation; confirm all statutory filings are on track	President + Treasurer + ED	Complete and present ED review to board in camera; confirm audit fieldwork dates; confirm T3010 and Annual Return timelines

Tip — Post This Calendar

Share this compliance calendar with the full board at the start of each year — ideally in July after the AGM, when the new board year begins. Set recurring calendar reminders for yourself and the ED for the three most time-sensitive obligations: AGM, T3010 filing, and Annual Return to Service Alberta.

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A Note from Guardian Accounting

The President role is among the most demanding — and most rewarding — volunteer contributions a person can make. You are being asked to lead a board of dedicated volunteers, steward community resources, support a professional team, and help your organization navigate a complex and ever-changing environment. That is a significant responsibility, and we do not take lightly the trust it requires.

Guardian Accounting is here to support you and your board throughout the year — not just at audit time or year-end. Whether you have a question about a contract you are being asked to sign, a governance situation you are unsure how to handle, or a compliance deadline that is approaching, please reach out to your Guardian Accounting contact. No question is too small when the stakes are organizational health and community impact.

This guide should be **reviewed annually** and updated to reflect any changes in your organization's bylaws, Alberta legislation, CRA requirements, or organizational structure. Guardian Accounting will notify you of material regulatory changes as they occur.

We also encourage you to share this guide with your incoming board members as part of a comprehensive onboarding program, and to read it alongside the **Guardian Accounting Treasurer Onboarding Guide**, which provides the financial and compliance detail that complements this governance-focused resource.

On behalf of the entire Guardian Accounting team — thank you for your service. The Alberta nonprofit sector is stronger because of leaders like you who give their time, expertise, and judgment to the organizations that serve our communities.

We are honoured to be your trusted governance and accounting partner.

Guardian Accounting

Empowering Leaders. Protecting Organizations.

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Important Disclaimer This guide is intended for general governance information purposes only. It does not constitute legal, accounting, or professional advice. Organizations should consult qualified legal counsel and their accounting professional for advice specific to their circumstances. Guardian Accounting assumes no liability for decisions made on the basis of this guide alone.

Companion document: Guardian Accounting Treasurer Onboarding Guide (2026 Edition)

Review annually. Update as bylaws, legislation, or organizational structure change.

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