

— F R E E R E S O U R C E —

NEW CHAPTER AUDIT CHECKLIST

Launch with Clarity — From Structure to 90-Day Milestones

Starting a new chapter, program, or initiative is one of the most exciting — and most overwhelming — things an organization can do. This checklist walks you through the critical milestones across your first 90 days, organized in three phases: Foundation, Operations, and Growth.

PHASE 1: FOUNDATION (Days 1–30)		
☐	Governing documents are filed, current, and accessible (bylaws, charter, constitution).	Owner: _____
☐	Founding leadership roles are filled and responsibilities are understood.	Owner: _____
☐	A communication platform has been selected and all founding members have access.	Owner: _____
☐	A shared calendar is established with key dates for the first 90 days.	Owner: _____
☐	A bank account or financial account has been opened with dual signatories.	Owner: _____
☐	National/regional/umbrella organization requirements are known and documented.	Owner: _____
☐	A new member orientation plan is in development.	Owner: _____
PHASE 2: OPERATIONS (Days 31–60)		
☐	Meeting structures (frequency, format, decision-making process) are established.	Owner: _____
☐	A program calendar for the first semester/cycle has been drafted.	Owner: _____
☐	Roles and responsibilities are documented in writing and distributed.	Owner: _____
☐	The first community-facing initiative or program has been planned.	Owner: _____
☐	Brand identity elements (name, logo, colors) are finalized and approved.	Owner: _____
☐	Social media profiles are created and managed by an assigned team member.	Owner: _____
☐	Financial policies (spending authority, reporting, budget approval) are in writing.	Owner: _____
PHASE 3: GROWTH (Days 61–90)		
☐	Membership growth goals for the first year are set and tracked.	Owner: _____
☐	Community and campus partnerships are being actively developed.	Owner: _____



☐	Documentation and record-keeping systems are live and in use.	Owner: _____
☐	Leadership development opportunities have been identified for the team.	Owner: _____
☐	An evaluation process for programs and initiatives is in place.	Owner: _____
☐	The chapter has a clear value proposition — members know why this organization exists.	Owner: _____
☐	A transition plan is already being considered for the next leadership cycle.	Owner: _____

YOUR 90-DAY CONFIDENCE CHECK

After completing the checklist, answer these three questions:

What are we most proud of in our first 90 days?	
What is the one gap we still need to close?	
What does success look like at the 1-year mark?	

Why this matters: Clarity at launch determines trajectory. Organizations that define success early are the ones that build sustainable momentum.

READY TO GO DEEPER?

This resource is just the beginning. Here's how to take the next step:

 Questions? hello@alwaysinharmony.com General inquiries & resources	 Free 30-Min Consult Book at alwaysinharmony.com No commitment required	 Department Support strategy@alwaysinharmony.com Strategy & customized solutions
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