

Leading with
INTENTIONAL
Friendship & Service



Welcome

Link Vanessa Falls

Southern Area Director
Birmingham (AL) Chapter

Leading with
INTENTIONAL
Friendship & Service





Attendee Engagement Guidelines



Microphones will be muted by the technology team for the duration of the webinar. We ask all attendees to please keep microphones muted to minimize any disruption or interference.



Today's session is being recorded and will be available to members on the Southern Area website.



Please submit all questions via the Zoom chat feature. Questions will be addressed at designated times during the presentation.



The presentation slides will be posted in the Members' section of the Southern Area Website.



Attendees will earn 1.5 hour(s) for attending this webinar.

AGENDA

Leading with
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Welcome

Linkspiration- Link Camille Kluttz-Leach

National Updates

Southern Area Updates

Leadership Summit Update –Link Susanne Matthews,
SA Chair, Logistics and Event Planning

Financial Updates- Link Anika Calloway, SA Treasurer

Programming Updates - Link Persharon Dixon,
SA Program Coordinator

Technology Review- Link Melonie Davis Jones,
SA Chair, Technology

Q & A

Linkspiration



**Camille Kluttz-Leach
Grandiflora (NC) Chapter**

THE LINKS, INCORPORATED

OUR MISSION

Friends transforming communities through service.

OUR VISION

Enrich communities and improve the quality of life for people of African descent through friendship and service

OUR VALUES

- Friendship
- Honesty
- Commitment
- Courage
- Integrity
- Service
- Family Relationships
- Respect for Others and Self

OUR NATIONAL STRATEGIC PRIORITIES

- Friendship and Engagement
- Transformational Community Service
- Fiscal Sustainability
- Operational Excellence and Alignment
- Brand Awareness
- Leadership and Professional Development

National Updates



November 9th- National Founders Day Observation (Virtual)

November 14th -16th National Donor Sabbath Weekend & Blood Drive

February 18-21, 2026- Jamaica Mission Trip

June 24-28, 2026- 45th National Assembly, Detroit, MI

National Updates Congratulations!!

The Links, Incorporated Way

CO-DESIGNATED BY:
Miami-Dade County Resolution
City of Miami Gardens Resolution

Southern Area Updates



September 16, 2025- National Voter Registration Awareness Day

September 18, 2025 – Communications Webinar -8:30 PM (EDT)

September 22, 2025- • **Chapter Presidents** must submit nominations via the **SHLI Application tab** in their **Member's Only profile**

September 27, 2025- Walk for Healthy Living

**Don't forget to Upload your
frame for National Voter
Registration Day**



Protocol Reminder



Of the 83 Chapters, only 55 Chapters have Chapter Protocol Chairs present in MMS. Please update to include your protocol officers for chapter protocol chairs meetings and other crucial information

Leadership Summit
Leadership by Design:
The Blueprint for
Intentional Friendship and
Service



Susanne Matthews
Southern Area Chair, Logistics
&
Event Planning
Tri-County (AL) Chapter

SAVE THE DATE



Southern Area Leadership Summit

Leadership by Design:

The Blueprint for Intentional Friendship and Service

January 22-24, 2026

British Colonial Hotel | Nassau, Bahamas

September 15th Finance Deliverables



Anika M. Calloway, Esq.
Southern Area Treasurer
Dogwood City (GA) Chapter

Critical September 15, 2025 Deliverables

Activity	By Whom	To Whom	Documents	Comments	Fees
Internal Audit Completed and Submitted	Internal Audit Committee	National via IMIS System	All Financial Documents		\$500 No extension
External Audit/Financial Review Completed	Outgoing Treasurer	CPA	All Financial Documents		
Form 990, 990-N, 990-EZ Completed	Outgoing Treasurer	Incoming Treasurer	Internal or External Audit Reports		
External Audit Submitted	Incoming Treasurer	audit@linksinc.org		Maintain copies	\$500
Form 990 Submitted to IRS	Incoming Treasurer	IRS – Electronically		Maintain copies	\$100 or IRS Form 8868 mailed + National Treasurer approval
Bonding Insurance Paid	Incoming Treasurer	linkinc.org		Maintain copies	\$500

All Due By September 15th

★ Don't Be Late! Non-Compliance is Costly! ★

- \$100 | Late Filing of Form 990, 990N, 990EZ
- \$500 | Late Submission of Bonding Insurance
- \$500 | Late Filing of Internal Audit Certification

LINKS FINANCIAL CALENDAR	
SEPT	<p>Deadline for submission of 990, 990-EZ, 990-N Tax Form to the IRS, with a copy to The Links, Incorporated. If an extension is filed, a copy of the extension request is to be forwarded to The Links, Incorporated.</p> <p>Deadline for submission of Chapter Bonding Insurance, to be processed online. Bonding insurance is due regardless of chapter filing for an extension of Form 990.</p> <p>Deadline for submission of Internal Audit Certification Form, with Treasurer Year-End Financial Report attached.</p> <p>Deadline for submission of Chapter External Audits or Financial Statements, if required.</p> <p>Chapter financial documents transitioned to new Chapter Treasurer by outgoing Treasurer.</p>
NOV	<p>External Audit due for all Chapters who were provided an extension from the National Treasurer on or before September 15th.</p> <p>Begin presenting Chapter budgets to membership for review and recommended changes.</p>
FEB	<p>Deadline for all Chapter budgets to be approved by membership.</p>
MAR	<p>Deadline for submission of Chapter-approved budgets to the Area Treasurer for review.</p>
APR	<p>11:59pm Deadline for submission of member dues (without payment of dues late fee).</p>
APRIL	<p>Deadline for payment of Building Fund Assessment for new members (due by third year after induction).</p>
APR	<p>11:59pm Deadline for submission of member dues, with late fee.</p>
MAY	<p>Fiscal Year begins.</p> <p>Chapters should begin to prepare IRS Form 990 for tax reporting and to documentation needed for Internal Audits (with the Internal Audit Certification Form) and, if required, External Audits.</p>
JUN	<p>Deadline for transition of bank accounts to newly elected officers.</p>
JUN	<p>Complete the collection of a Financial Review if the External Audit is required.</p>
AUG	<p>IMIS System on the N payment of Bonding Insurance.</p>
SEPT	<p>Deadline for submission of 990, 990-EZ, 990-N Tax Form to the IRS, with a copy to The Links, Incorporated. If an extension is filed, a copy of the extension request is to be forwarded to The Links, Incorporated.</p> <p>Deadline for submission of Chapter Bonding Insurance, to be processed online. Bonding insurance is due regardless of chapter filing for an extension of Form 990.</p> <p>Deadline for submission of Internal Audit Certification Form, with Treasurer Year-End Financial Report attached.</p> <p>Deadline for submission of Chapter External Audits or Financial Statements, if required.</p> <p>Chapter financial documents transitioned to new Chapter Treasurer by outgoing Treasurer.</p>

Links Financial Calendar | September

September 15th Deliverables

Audit Timeline & Submission Dates

Extensions

- **No** extension is granted for the Internal Audit Certification Form & Annual Treasurer's Report. **Due September 15th**
- An extension is granted for Independent CPA reports not submitted by September 15th. **Extended deadline is November 15th**

New Process

- An extension for the Independent CPA's Report must be requested via Jotform by 11:59 pm EDT on September 15th or a \$500 fine will be assessed.



Fines



- If the Internal Audit Certification Form & Annual Treasurer's Report are not uploaded to the MMS System by September 15th, a **\$500 fine will be assessed**.
- If not submitted by November 15th, the chapter will be subject to disciplinary actions including but not limited to an **additional fine of \$500** as approved by the Executive Council.

New Process: Request for Extension

<https://form.jotform.com/nationaltreasurer/RFE>

Current Extension Request Process – Financial Documents

- **External review** or **External Audit**: Treasurer or President emails the **National Audit Chair** to request an extension.
- **Form 990, 990-N, or 990-EZ**: Treasurer or President emails the **National Treasurer** to request an extension.

New Extension Request Process – Financial Documents

- **Step 1**: Chapter President completes and submits the “**Request for Extension**” Jotform using the link provided here.
- **Step 2**: Based on the nature of the request, the form will be reviewed and approved by the **National Audit Chair**, the **National Treasurer**, or both.
- **Step 3**: Approved extensions will allow submissions until **November 15**.

An e-Blast was sent to the Chapter Presidents, Treasurers, Financial Secretaries and Audit Chairs, August 14, 2025

September 15th Deliverables

Programming Updates



Persharon Dixon
SA Program Coordinator
Daytona Beach (FL)
Chapter

AREA PROGRAMMING UPDATES



- STY - HBCU Programming in October (Kemba Human trafficking Talkback) See Them See Us TownHall – SA youtube
- ARTS - National Competitions, Film Talkback Document
- NTS - Voter Reg Day (Frame), Southern Grace, Emerald Plate –WFHL opportunity
- ITS - Playground donations (form)
- HHS- WFHL , Breast Cancer Initiative/Quilts, Fight Like a LinkTownHall,
- Gen Programs - Intent Mag (food for thought), A Stitch in Time, Area Shirt Sale through Sept. 27
- **Sept 18 - National Programs 2**

*****AREA WEBSITE KEY TO SUCCESS*****

Tech-Driven Leadership K.I.S.S.



Melonie Jones
SA Chair, Technology
Camellia Rose (GA)
Chapter

Tools to make your life simpler

- Track it Forward
- Let's Review the Technology Guidelines
- Suggested Apps and Tools
- SA Website
 - How do I get in





- Track it Forward is an **online and mobile app** system designed for volunteers to track hours.
- It is endorsed by National
- The Basic Plan is \$12/month (billed annually for 100 users) or \$144.00/year

All Users / Basic Plan Features



Time Tracking

Our biggest priority is volunteer time tracking, we focus all our effort to make sure you have accurate data saved in the software. Volunteers can log their own hours or you can use our other features for automatic hour logging.

[read more](#)



Mobile App

Volunteers can easily log hours on the mobile app. They can also access their timesheet, and sign up for events. An admin can also use the mobile app to add new volunteers, view hours, or approve/decline hour log submissions.

[read more](#)



Reports

Reports can be pulled instantly and exported as an Excel document. Show multiple fields like volunteer, activity, or even a customized field. There are a few options to group and filter your reports as well!

[read more](#)



Integration & Widgets

Embeddable Charts, Event Calendar, and Hour Logs can all be put on your organization's website for easy volunteer access or one-time volunteer access. This helps for volunteers who might struggle with technology.

[read more](#)



Event RSVPs

You can create an event calendar that allows volunteers to sign up for events or shifts. You also have the option to customize notifications to volunteers and you can even log their hours through the event verification tool.

[read more](#)



Milestones

Set up requirements or goals for your volunteers to hold themselves accountable and for you to check in on which volunteers are excelling or falling behind! Both volunteers and organizers can see milestone progress.

[read more](#)

**Did you know
there is a
Technology
Reference
Guide?**



TECHNOLOGY REFERENCE GUIDE



**Members Only
Documents/Technology Folder**

Email



- ❑ Link members must use a personal email account to receive emails from National Headquarters, the National President and/or National Committees instead of their professional/work email address.
- ❑ When sending emails to five people or more or groups (internal or external), it is a best practice to use the 'bcc' (blind carbon copy) option. This allows each recipient to only see their email address.

Group Messaging

- ❑ Chapters may use robocalling, text messaging, and/or mass messaging services to send alerts about, but not limited to: (1) Meeting and event details, updates, and reminders or (2) Meeting and event cancellations due to weather or power outage.
- ❑ Members must be given the option to receive group messages. DO NOT add anyone to a group without their knowledge or consent. Group members must have a way to remove themselves from the group.
- ❑ Only use personal phone numbers to send voice and text messages instead of professional/ work mobile phone numbers.



Electronic Voting



- ❑ Chapters electing to use vote electronic technology tools must ensure:
 - Only those chapter members present for the meeting during which the election is held receive a ballot;
 - Each member is only allowed to cast one ballot per election or run-off;
 - The confidentiality of each member's vote is maintained.

Suggested Apps and Tools

Collaboration

 Google Workspace

 slack

 Dropbox

Communication

 groupme

 zoom

 WIX

 Momento

Creating

 Canva

 Adobe

 Microsoft

 Pixlr Editor

 Clipchamp

Accessing the SA Website



Accessing the Members Only section of salinksinc.org

- All members will need to register when visiting the site for the first time.
- During this one-time setup, you must complete the form, enter your email address, create a password and enter the access code **“SA2023LWIFAS”**
- Agree to the Terms and Condition, check the reCAPTCHA and click “Sign Up”
- Going forward, click “Already a member? Log In to access the members only section by entering email address and password.



Technology Workshop – Enhance and Advance: Tech Tools and Tips for Chapter Excellence

October 23, 2025 @ 8:30 pm



Thank you.

Melonie Davis Jones
Chair, Southern Area Technology Committee
Camellia Rose (GA) Chapter

 Salinkstechnology@gmail.com

 816-547-2253

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Vanessa Falls, Southern Area Director



ANY QUESTIONS?

- Please submit all questions via the Zoom chat feature.
- Questions will be answered in the order received.
- Please note - Due to time constraints, all questions may not be answered.

Next President's Webinar



October 6, 2025 @ 8:30 PM (ET)



Thank you.

Vanessa Falls
Area Director
Birmingham (AL) Chapter

 director@salinksinc.org

 205.616.8536

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