



Club President Planning Calendar

This calendar is a general guide that club presidents can use as they create a customized calendar for their club. The club calendar should show the club's regular meeting dates (business, program and board meetings), as well as dates for district meetings, region conference and federation convention. The calendar should also include club-specific events and programs; major community events for possible club involvement; and federation activities and related deadlines (refer to the Club Calendar of Events for the current club year in the membership section of the members area of www.soroptimist.org).

July

- Sign new signature cards at the club's bank (president and treasurer) for disbursement of club funds during the coming year.
- Appoint committee chairs and members (if applicable).
- Attend federation convention (during even-numbered years, usually in July or August).
- Order Soroptimist Women's Opportunity Awards and Soroptimist Violet Richardson Award materials.

August

- Finalize plans for the club year including conducting an evaluation of current club projects. Remember that clubs are not required to participate in every Soroptimist program. Discuss and vote as a club on the projects club members are interested in and can handle.
- Ensure that club books are audited for the previous fiscal year. The audit should be performed by a qualified committee of the club, or a qualified accountant, and be completed by August 31 (if the club's fiscal year is July 1 through June 30).
- In a convention year, have the club delegate and others who attended prepare a convention report for presentation to club members.
- In odd-numbered years, submit all proposed federation bylaws changes and resolutions that require convention action by September 1.

September

- Remind treasurer to file IRS form 990 by November 15 (US clubs).
- Distribute current club roster and list of committee members (if applicable).
- Distribute Women's Opportunity Awards and Violet Richardson Award applications.
- Form a group to oversee the Making a Difference for Women Award.
- Be prepared to submit names of candidates for region or federation office. Candidates may be from the club or any club in the region. Nominations must be submitted by the date specified in the request.

October

- Celebrate Founders Day on October 3 with a special event that highlights SIA's mission of improving the lives of women and girls.
- Attend district or area meetings (if applicable) and region conference; arrange for reports to club.
- Begin fundraising for contributions to support participation in programs.

November

- File IRS form 990 by November 15 (US clubs).
- Present names and qualifications of candidates to the club and execute the mail ballot for federation Board of Directors, if applicable.
- Participate in the Soroptimist Workplace Campaign to End Domestic Violence (November 25, International Day to Eliminate Violence Against Women).

December

- Observe Human Rights Day (also Soroptimist International Day) on December 10 by donating to the SI President's Appeal.
- Conduct selection of Violet Richardson Award honoree. Forward honoree's application to district or region chair by January 15.

January

- Conduct Women's Opportunity Awards judging (completed applications are due to the club committee chair by December 15). Forward winners' names to the district by February 1 (the district must submit the names to the region by March 1). Non-districted regions should forward winners' names to the region by March 1.
- Forward Soroptimist Celebrating Success! entries to SIA headquarters.
- Remind treasurer that IRS form 1099 should be provided to last year's Women's Opportunity Awards recipient(s), no later than January 31, if the amount of each award is \$600 or more (US clubs).

February/March

- Appoint or elect the club nominating committee.
- Consider honoring someone with Laurel Society membership.
- In a convention year, ensure that the treasurer forwards the club mandatory convention fee (as established by the federation Board of Directors) to headquarters no later than March 15.
- Read and discuss the official call to conference and encourage attendance. Send in conference registration fees by established deadline. In an even-numbered year, study the qualifications of candidates for region offices, as submitted with the call to conference.
- Host a Live Your Dream event on March 8, International Women's Day, to honor club Women's Opportunity Awards, Violet Richardson Award and Making a Difference for Women Award recipients.
- Submit proposal for Soroptimist Club Grant for Women and Girls.
- Begin planning for installation of new officers in June.

April

- Execute mail ballot for the federation president-elect.
- Attend the region spring conference.
- *In a convention year:*
 - Study and discuss the resolutions and amendments to come before the convention body.
 - Complete and submit registration forms to headquarters for delegates and non-delegates attending the federation convention.

April/May

- Elect club officers, board members, delegates and alternates to the region conference. (Also, in a convention year, elect the delegate and alternates to the federation convention.)
- Send a list of names and addresses of elected delegates and alternates to the region secretary with copies to the governor and the region treasurer.
- Ensure that the finance committee prepares the club's operating and service budgets and presents them to the club at an April or May business meeting.

May

- Ensure that the budget, which will be approved during the May or June annual meeting, is submitted and that it includes funds for a delegate to attend region conferences and federation convention.
- Have conference delegates report to the club.
- Ensure that the treasurer reviews the federation dues invoice and membership roster and remits appropriate funds to headquarters prior to July 1. Roster changes must include terminations made prior to July 1. Payment should include dues for all members; magazine subscriptions for life members, honorary recognitions, and others (library, friendship links, etc.); mandatory club liability insurance for all members (for clubs in the US, Guam, Puerto Rico, and Canada); and voluntary Founders Pennies to support Soroptimist programs.
- Remind committee chairs that annual reports are due at the designated annual meeting in May or June (if applicable).
- In a convention year, read and discuss the official call to convention.
- Complete arrangements for the installation of new club officers.

June

- Send completed Club Award form to headquarters before June 1 deadline.
- Ensure that club treasurer has collected dues from all members to allow sufficient time to make payment to the federation and region by July 1.
- Install new club officers.
- Facilitate the transition of new club officers and committee chairs through an exchange of materials and joint training sessions. An important part of the club president's responsibility is to ensure that her successor is well-informed and trained.
- Evaluate all club activities for effectiveness and to ensure that all projects and programs are consistent with SIA's mission and goals.

Throughout the Club Year

- Involve all members in ongoing plans for membership recruitment and retention.
- Consider sponsoring a new club. (See "Ten Steps for Chartering a New Soroptimist Club" in the membership section of the members area of www.soroptimist.org.)
- Ensure that the treasurer submits new members with appropriate dues payments to headquarters either online or by sending Form 5008. New members will receive a welcome email informing them of their member number and directing them to the many resources available on the SIA website.
- Ensure that the treasurer submits membership changes online or by using Form 5010 for name changes, address changes, changes in membership type, etc.
- Explore the possibility of joint community service with neighboring Soroptimist club(s) or other service organizations.