



SOROPTIMIST  
Best for Women®

*Improving the lives of women and girls  
through programs leading to social  
and economic empowerment.*

## SOROPTIMIST INTERNATIONAL OF THE AMERICAS

### Sample Club President Planning Calendar

This calendar is a general guide that club presidents can use to 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 under "[club administration](#)" in the membership section of the members area of [www.soroptimist.org](http://www.soroptimist.org)).

#### July

- Annual federation dues, Form 200 (New Officer Information) due to headquarters by July 1.
- 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) and update your club roster (<http://www.soroptimist.org/members/membership/updateroster.html>).
- Attend federation convention (during even-numbered years, usually in July or August).
- Download Live Your Dream: Education and Training Awards for Women materials from the SIA website.
- Submit entries for Soroptimists Celebrating Success Awards to region chair on or before July 1.
- Distribute Live Your Dream Awards applications. (*Application deadline for club-level awards is November 15.*)

#### August

- Finalize plans for the club year including conducting an evaluation of current club projects. Refer to the [Club Roadmap for Success](#) as a guide to help the club understand their role in achieving the goals of the SIA Strategic Plan. 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

- U.S. Clubs: Remind treasurer to file IRS Form 990 by November 15.
- Distribute current club roster and list of committee members (if applicable).
- 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 through programs leading to social and economic empowerment. If your club hasn't already submitted your club's Founders Pennies, Founders Day is the perfect time to collect pennies.
- Attend district or area meetings (if applicable) and region conference; arrange for reports to club.
- Begin fundraising for contributions to support federation programs. Your contribution of at least 10% of the money you raise locally will fund the Dream Programs. The remaining 90% funds the club's local projects. Together Soroptimist's collective impact is increased.

### November

- U.S. Clubs: File Form 990 due to the IRS no later than **November 15** (clubs with July 1-June 30 fiscal year).
- Present names and qualifications of candidates to the club and execute the mail ballot for federation Board of Directors, if applicable.
- Gather Live Your Dream Awards applications by the **November 15** deadline and check for eligibility.

### December

- Celebrate Soroptimist International Day (also Human Rights Day) on **December 10** by donating to the SI President's Appeal.
- Conduct Live Your Dream Awards judging and select a recipient.

### January

- Remind treasurer that IRS Form 1099 should be provided to last year's Live Your Dream Awards recipient(s), no later than January 31, if the amount of each award is \$600 or more (U.S. clubs).

### February

- Forward Live Your Dream Awards recipients' names to the district by February 1 (the district must submit the names to the region chair by February 15 deadline).

### February/March

- Appoint or elect the club nominating committee.
- Consider honoring someone with Laurel Society membership.
- In a convention year, ensure that the treasurer pays the club convention fee (as established by the federation Board of Directors) online or submits 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 Awards event on **March 8**, International Women's Day, to honor club Live Your Dream Awards recipients.
- Begin planning for installation of new officers in June. Order new officer pins and member recognition items from Soroptimist store.

### March

- Submit proposal for Soroptimist Club Grants for Women and Girls by **March 1**.
- Consider candidates for federation president-elect and submit mail ballot to SIA headquarters.
- Live Your Dream Awards Region Chairs must submit region reporting to SIA headquarters by **March 15**.

### April

- 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.
- Consider candidates for Fundraising Council and submit mail ballot to SIA headquarters.

### 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 information and membership roster and remits appropriate funds to headquarters prior to July 1 either online or to SIA headquarters. Roster changes must include terminations made prior to July 1. Payment should include dues for all members; mandatory club liability insurance for all members (for clubs in the U.S., Guam, Puerto Rico, and Canada); voluntary contributions to Founders Pennies and Club Giving to support Soroptimist programs may also be made with the dues payment.
- 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

- Submit a Dream It, Be It club transmittal form to your Dream It, Be It Region Chair within one month of completing your project (no later than **June 1**).
- Submit Dream It, Be It evaluation information to the [online form](#) within one month of completing your project (no later than **June 1**).
- Ensure that the 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.
- Notify headquarters of new club president and treasurer either online or by sending Form 200 – due on or by July 1.

### Throughout the Club Year

- Encourage members to visit the SIA website ([www.soroptimist.org](http://www.soroptimist.org)) regularly to:
  - Access valuable resources and important SIA updates
  - Purchase items from [Soroptimist](#) and [LiveYourDream.org](http://LiveYourDream.org) to fund life-changing Soroptimist programs for women and girls all over the world

- “Get in the network” by following Soroptimist on Facebook, Twitter, LinkedIn and YouTube
- Give a gift in honor or memory of an individual or to commemorate a significant club anniversary
- Submit a Dream It, Be It club transmittal form to your Dream It, Be It Region Chair within one month of completing your project (no later than June 1).
- Submit Dream It, Be It evaluation information to the [online form](#) within one month of completing your project (no later than June 1).
- Involve all members in ongoing plans for membership recruitment and retention.
- Consider sponsoring a new club. (See “[New Club Building Guide](#)” in the [membership section](#) of the members area of [www.soroptimist.org](http://www.soroptimist.org).)
- Ensure that the treasurer submits new member information 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 volunteer organizations.
- Regularly monitor club’s “@soroptimist.net” email account.
- Encourage members to participate and engage in [LiveYourDream.org](http://LiveYourDream.org).