



SOROPTIMIST

Best for Women

Soroptimist International of the America's, Inc.

Golden West Region

2017-2018

Club Officer's Activity Checklist

SOROPTIMIST

Golden West Region

ONE *mission*

2017 – 2018 Officer's Checklist

Golden West Region Soroptimist International of the Americas CLUB OFFICER'S 2017-2018 ACTIVITY CHECKLIST

JULY

<input type="checkbox"/> Submit SIA Form 200: Report of New Club Officers Submit GWR form of New Club Officers	<p>Complete and submit Report of New Club Officers online to SIA Membership Forms</p> <p>Submit club president and club treasurer contact information to the GWR Secretary in the format identified by her.</p>	<p>Ensure this list is completed and submitted as soon as club officers are identified.</p>
<input type="checkbox"/> Submit Club Membership Forms (5008 & 5010) to SIA and GWR Submit Club Dues	<p>Complete and submit Membership forms to SIA & GWR</p> <p>Membership Forms</p> <p>GWR Dues Invoice</p>	<p>Ensure Club Treasurer completes and mails membership change forms to both SIA and to GWR Treasurers within 30 days of member induction, transfer or termination</p>
<input type="checkbox"/> Attend Leadership Training Retreat	<p>Make plans for members to attend the Leadership Training Retreat in August</p>	
<input type="checkbox"/> Audit club books	<p>Review club bylaws for audit process and timeline</p> <p>Download SIA suggested Club Audit form</p>	<p>SIA recommends audit completion no later than August 31; present audit report to club; file in club permanent records</p>
<input type="checkbox"/> Review officer duties and assign new committee chairs and committee members	<p>Download SIA suggestions for Club Administration and Club Bylaws</p>	<p>Distribute committee assignments to chairs</p>
<input type="checkbox"/> Sign new bank account signature cards & reassign PO box key	<p>Your bank will usually need a copy of club business minutes listing the names of new officers</p>	<p>Have new president, treasurer & secretary sign bank account signature cards</p>
<input type="checkbox"/> Order and Distribute Live Your Dream Award Applications	<p>Download information about Live Your Dream Award</p>	<p>IMPORTANT DATES: Live Your Dream Award applications to Club - November 15</p> <p>Send your club Live Your Dream Award recipient to GWR District LYDA Committee by February 1</p>
<input type="checkbox"/> Plan Dream It, Be It: Career Support for Girls event	<p>Download information about Dream It, Be It: Career Support for Girls</p>	<p>Report due to Dream It Be It Region Coordinator by April 15</p>
<input type="checkbox"/> Submit Soroptimist Celebrating Success Award application	<p>Soroptimist Celebrating Success recognizes outstanding club projects and best practices in each of the four areas of the SIA Strategic Plan: program, members, public awareness, and fundraising. Get forms and instructions at GWR website Soroptimist Celebrating Success</p> <p>Submit projects or practices started or completed during the 2016-2017 calendar year</p>	<p>Send to SCS Chair by September 30</p>

Golden West Region Soroptimist International of the Americas CLUB OFFICER'S 2017-2018 ACTIVITY CHECKLIST

AUGUST

<input type="checkbox"/>	Download planning calendars from SIA Website	<p>In addition to this Club Officer Activity Checklist, the following documents are available from www.soroptimist.org:</p> <ul style="list-style-type: none"> •2017-2018 Club Calendar of Events •Club President Planning Calendar •2017-2018 Program Quick Reference Guide 	Keep these handy, as members will be asking you for this information Share with your board and committee chairs as applicable
<input type="checkbox"/>	SIA Club Grant impact reports due from clubs receiving Grant Funds	Clubs who received SIA Club Grants for Women and Girls projects must report impact.	
<input type="checkbox"/>	Send news release of new club officers to local media	A variety of resources related to publicity and public awareness are available for download from www.soroptimist.org :	Send to local newspaper(s) & Chamber of Commerce
<input type="checkbox"/>	Hold a club planning retreat	<p>The SIA website has many excellent resources available for download at www.soroptimist.org:</p> <p>▫<i>Keeping the Balance For Clubs</i> ▫ <i>Skills and Talents Assessment Tool</i> ▫ <i>Club Assessment Form Sample</i> ▫ <i>Club Strategic Plan</i></p>	Assign a committee to help with the retreat
<input type="checkbox"/>	Attend Leadership Training Retreat	Make plans for members to attend the Leadership Training Retreat in August	
<input type="checkbox"/>	Late fees for unpaid dues	Clubs will receive late fees for unpaid dues	
<input type="checkbox"/>	Order and distribute Live Your Dream Award Applications	Download information about Live Your Dream Award	<p>IMPORTANT DATES: Live Your Dream Award applications to Club - November 15</p> <p>Send your club Live Your Dream Award recipient to GWR District LYDA Committee by February 1</p>
<input type="checkbox"/>	Plan Dream It, Be It: Career Support for Girls event	Download information about Dream It, Be It: Career Support for Girls	Report due to Dream It Be It Region Coordinator by April 15
<input type="checkbox"/>	Submit Club Membership Forms (5008 & 5010) to SIA and GWR Submit Club Dues	<p>Complete and submit Membership forms to SIA & GWR</p> <p>Membership Forms</p> <p>GWR Dues Invoice</p>	Ensure Club Treasurer completes and mails membership change forms to both SIA and to GWR within 30 days of member induction, transfer or termination
<input type="checkbox"/>	Submit Soroptimist Celebrating Success Award application	<p>Soroptimist Celebrating Success recognizes outstanding club projects and best practices in each of the four areas of the SIA Strategic Plan: program, members, public awareness, and fundraising. Get forms and instructions at GWR website Soroptimist Celebrating Success</p> <p>Submit projects or practices started or completed during the 2016-2017 calendar year</p>	Send to SCS Chair by September 30
<input type="checkbox"/>	Complete "Shining/Healthy Clubs" report and send to District Director	<p>The GWR has been asked by SIA to track and measure areas important for organizational success. To ensure your club is on-track to be a shining, healthy club, complete this form and share with your club board/members. Your District Directors will use your responses to guide their official visit discussion with your club leaders. Reporting - Healthy Clubs</p>	2016-2017 information is due to District Directors by September 1st . A survey version may be available for the update (July 2017-January 2018) due by February 1st .

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S E P T E M B E R

<input type="checkbox"/> Register for District Fall Meeting	The Call to your club's District Fall Meeting will be issued via email approximately 60 days before the event.	Send Registration to District Fall Meeting Registration Chair per instructions in Call
<input type="checkbox"/> Submit the "Shining/Healthy Club" checklist to your District Director	To follow the GWR and SIA Strategic Plans for success, we've created a "Shining/Healthy Club" checklist for you. This form with guide the discussion during your official club visit with the District Director and will be part of her report to the GWR Board.. Shining-Healthy Club Checklist	Complete the checklist with your board members and club members then send it to your District Director. Due Sept 15
<input type="checkbox"/> Send official visit date suggestions to your District Director	Your District Director will visit your club once per biennium with expenses paid by the GWR. Additional visits will be at your club's expense or the District Director's personal expense. This visit is for discussion of your successes and challenges and to provide Soroptimist education, leadership development, and recruitment and retention advice.	
<input type="checkbox"/> Order and distribute Live Your Dream Award Applications	Download information about Live Your Dream Award	<p>IMPORTANT DATES: Live Your Dream Award applications to Club - November 15</p> <p>Send your club Live Your Dream Award recipient to GWR District LYDA Committee by February 1</p>
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<input type="checkbox"/> Plan Soroptimist Summit: Access to Education event in your own community	Soroptimist Summit planning resources are available on GWR website	
<input type="checkbox"/> Complete "Shining/Healthy Clubs" report and send to District Director	The GWR has been asked by SIA to track and measure areas important for organizational success. To ensure your club is on-track to be a shining, healthy club, complete this form and share with your club board/members. Your District Directors will use your responses to guide their official visit discussion with your club leaders. Reporting - Healthy Clubs	2016-2017 information is due to District Directors by September 1st . A survey version may be available for the update (July 2017-January 2018) due by February 1st .

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O C T O B E R

<input type="checkbox"/> Soroptimist Founders Day - October 3	Download Soroptimist 101 from www.soroptimist.org for information about the founding and history of the organization:	Celebrate with a special event that highlights SIA's mission of improving the lives of women and girls
<input type="checkbox"/> United Nations Day - October 24th	Soroptimist International has consultative status with the United Nations' Economic and Social Council (ECOSOC), which oversees U.N. activities and policies promoting human rights. Soroptimist representatives advocate for the Soroptimist mission of improving the lives of women and girls. Learn more: http://www.soroptimistinternational.org/si-at-the-un	
<input type="checkbox"/> Attend District Fall Meeting	Consult your district fall meeting call for meeting agenda and driving directions District 1 - October 6-7, 2017 District 2 - October 20-21, 2017 District 3 - October 13-14, 2017 District 4 - October 27-28, 2017	Have fun attending with your club members, learn a lot and don't forget to report back to your club!
<input type="checkbox"/> Order and distribute Live Your Dream Award Applications	Download information about Live Your Dream Award	IMPORTANT DATES: Live Your Dream Award applications to Club - November 15 Send club Live Your Dream Award recipient to GWR District LYDA Committee by February 1
<input type="checkbox"/> Plan Dream It, Be It: Career Support for Girls event	Download information about Dream It, Be It: Career Support for Girls	Report due to Dream It Be It Region Coordinator by April 15
<input type="checkbox"/> Federal and State Tax Returns	Download Club Treasurer Guidelines from the www.soroptimist.org : Download the Club Treasurer's Manual from the GWR website at: GWR Treasurer's Manual :	Your club treasurer should be working on tax returns, which are due to the IRS and your state by November 15
<input type="checkbox"/> Submit Club Membership Forms (5008 & 5010) to SIA and GWR Submit Club Dues	Complete and submit Membership forms to SIA & GWR Membership Forms GWR Dues Invoice	Ensure Club Treasurer completes and mails membership change forms to both SIA and to GWR Treasurers within 30 days of member induction, transfer or termination
<input type="checkbox"/> Plan Soroptimist Summit: Access to Education event in your own community	Soroptimist Summit planning resources are available on GWR website	

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NOVEMBER

<input type="checkbox"/> Federal and State Tax Returns IRS Form 990	Download Club Treasurer Guidelines from the www.soroptimist.org : Download GWR Club Treasurer's Manual from the GWR website	Check with your club treasurer—tax returns are due to the IRS and your state by November 15
<input type="checkbox"/> Participate in Soroptimist Workplace Campaign to End Domestic Violence	Download information on this program from www.soroptimist.org : Soroptimist Workplace Campaign to End Domestic Violence	Coincides with International Day for the Elimination of Violence Against Women - November 25
<input type="checkbox"/> Nominate candidates for the 2018-2020 GWR Board	In 2017, Clubs will receive a request for nominations for candidates for the 2018-2020 GWR Board from the current GWR Nominating Committee Coordinator by Nov 1, 2017	Club is responsible for submitting nominations by December 1
<input type="checkbox"/> Live Your Dream applications due to club	Receive completed applications: Live Your Dream Committee should be arranging for judging of applications by local non-Soroptimist judges	IMPORTANT DATES: Live Your Dream applications to Club- November 15 Live Your Dream Winner to GWR District Committee Rep.— February 1
<input type="checkbox"/> Plan Dream It, Be It: Career Support for Girls event	Download information about Dream It, Be It: Career Support for Girls	Report due to Dream It Be It Region Coordinator by April 15
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DECEMBER

<input type="checkbox"/> Soroptimist International President's Appeal— December 10	<p>Observe Human Rights Day (also Soroptimist International Day) on December 10 by donating to the SI President's Appeal. For more information on this special day go to the United Nations website: http://www.un.org/rights/</p> <p>December 10 President's Appeal – donations will be made directly to SIA for this project. From the money collected, grants will be given to clubs that help develop solar energy projects in rural areas. Go to SIA website www.soroptimist.org for more information</p>	<p>Plan a program to share information on the SI President's Appeal project</p> <p>Treasurer sends funds collected or budgeted to SIA</p>
<input type="checkbox"/> Live Your Dream Award applications due to region district representative	<p>Receive completed applications: Live Your Dream Committee should be arranging for judging of applications by local non-Soroptimist judges</p>	<p>Live Your Dream Winner to GWR District Committee Rep.— February 1</p>
<input type="checkbox"/> Plan Dream It, Be It: Career Support for Girls event	<p>Download information about Dream It, Be It: Career Support for Girls</p>	<p>Report due to Dream It Be It Region Coordinator by April 15</p>
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JANUARY

<input type="checkbox"/>	Soroptimists STOP Trafficking Awareness-Raising Project	Download information on how your club can participate in the STOP Trafficking Awareness-Raising Project from www.soroptimist.org :	Coincides with National Day of Human Trafficking Awareness on January 11
<input type="checkbox"/>	Remind Treasurer to prepare IRS form 1099 for your Live Your Dream winners	Download GWR Club Treasurer's Manual from the GWR website	Send to Live Your Dream recipient(s) no later than January 31 , if the amount of cash award was \$600 or more
<input type="checkbox"/>	Mid-Year Club Budget Review	Ask club finance/budget committee & treasurer to prepare and present a mid-year budget review	During the month of January
<input type="checkbox"/>	Submit club Live Your Dream Award winner to GWR District Live Your Dream Award Committee District Representative	Download LIVE YOUR DREAM Award transmittal form available from the Golden West Region website	IMPORTANT DATES: Live Your Dream Winner to GWR District Committee Rep— February 1
<input type="checkbox"/>	Consider contribution toward outgoing region governor pin	Receive an opportunity to contribute toward a thank you gift for the outgoing region governor which is normally used to create a Soroptimist governor's pin	
<input type="checkbox"/>	Plan Dream It, Be It: Career Support for Girls event	Download information about Dream It, Be It: Career Support for Girls	Report due to Dream It Be It Region Coordinator by April 15
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F E B R U A R Y

<input type="checkbox"/>	Submit club Live Your Dream winner to GWR District Live Your Dream Committee Rep.	Use LIVE YOUR DREAM transmittal form available from the Golden West Region website:	Live Your Dream Winner to GWR District Committee Rep.— February 1
<input type="checkbox"/>	Plan Dream It, Be It: Career Support for Girls event	Download information about Dream It, Be It: Career Support for Girls	Report due to Dream It Be It Region Coordinator by April 15
<input type="checkbox"/>	Form club nominating committee	Review club bylaws for nominating committee formation procedures	
<input type="checkbox"/>	Prepare Soroptimist Club Grant for Women and Girls	Consider submitting an application for financial assistance in starting up or continuing projects in your local community. Grants are awarded in \$500 increments ranging from \$500 to \$10,000. Get information and application forms from www.soroptimist.org :	Take advantage of this opportunity! Form a committee to prepare your club grant application. Applications were due March 15
<input type="checkbox"/>	Plan for Soroptimist Saturday of Service—First Saturday in March	Submit a Program Focus Report for Saturday of Service projects, refer to July for details.	Join Soroptimists around the world by participating in a service project on Saturday, March 3
<input type="checkbox"/>	Submit Club Membership Forms (5008 & 5010) to SIA and GWR Submit Club Dues	Complete and submit Membership forms to SIA & GWR Membership Forms GWR Dues Invoice	Ensure Club Treasurer completes and mails membership change forms to both SIA and to GWR Treasurers within 30 days of member induction, transfer or termination
<input type="checkbox"/>	Plan Soroptimist Summit: Access to Education event in your own community	Soroptimist Summit planning resources are available on GWR website	
<input type="checkbox"/>	Complete “Shining/Healthy Clubs” report and send to District Director	The GWR has been asked by SIA to track and measure areas important for organizational success. To ensure your club is on-track to be a shining, healthy club, complete this form and share with your club board/members. Your District Directors will use your responses to guide their official visit discussion with your club leaders. Reporting - Healthy Clubs	2016-2017 information is due to District Directors by September 1st . A survey version may be available for the update (July 2017-January 2018) due by February 1st .

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M A R C H

<input type="checkbox"/>	Participate in the Soroptimist Saturday of Service	Join Soroptimists around the world by participating in a service project! Don't forget to report on your project:	Saturday, March 3
<input type="checkbox"/>	Host Live Your Dream Award event on March 8, International Women's Day	Plan a program to honor club Live Your Dream and New Girl Award recipients.	Don't forget to publicize your program!
<input type="checkbox"/>	Receive Call to GWR Spring Conference	All clubs will receive the spring conference call 60 days prior to the date of the spring conference— GWR Spring Conference Conference call materials will also available for download on the GWR West Region website at http://www.goldenwestregion.org/	Read and discuss the official call to conference and encourage member attendance. Send in conference registration fees by the established deadline.
<input type="checkbox"/>	Submit Soroptimist Club Grant Proposal	See February for program information.	Send Application to SIA BEFORE March 15
<input type="checkbox"/>	Plan Dream It, Be It: Career Support for Girls event	Download information about Dream It, Be It: Career Support for Girls	Report due to Dream It Be It Region Coordinator by April 15
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A P R I L

<input type="checkbox"/>	Register for Spring Conference	Consult your Conference Call for all information concerning registration and other activities for which forms must be submitted	Register delegates and club members before deadline specified in conference call
<input type="checkbox"/>	Elect club officers, board members, delegates & alternates	Check procedures outlined in your club bylaws for election of club officers, board members, delegates and alternate delegates	Include elections on your agenda
<input type="checkbox"/>	Order Past President's Pin	Order this special pin now from SIA so you will be able to present it to your outgoing president at the end of her year. You can order online from www.soroptimist.org	Order pin from SIA
<input type="checkbox"/>	Create Club budget proposal	Check club bylaws for any procedures related to budget development and adoption	Make sure your club finance or budget committee prepares and submits a budget for the coming year
<input type="checkbox"/>	Plan Dream It, Be It: Career Support for Girls event	Download information about Dream It, Be It: Career Support for Girls	Report due to Dream It Be It Region Coordinator by April 15
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M A Y

<input type="checkbox"/>	SIA-Founders Pennies - \$5.76 per member	Most clubs make this contribution along with their dues. (\$.06 per year per members since Soroptimist founding is used for Programs.) Some clubs wait and make this contribution to SIA in May. Direct Link: Founders Pennies	Make your contribution <u>BEFORE</u> May 31
<input type="checkbox"/>	Make Club Contribution to SIA Programs	Through Club Giving, support the SIA mission by contributing to programs that help women in all countries of our federation Forms are available from SIA at Club Giving	Club contributions must be <u>RECEIVED</u> by SIA by May 31 to be recognized for Club Giving in the current club year
<input type="checkbox"/>	Receive GWR Club Information Update for 2018-2019	Submit club President and club Treasurer contact information sent to you by the GWR Secretary in May.	Complete and return to GWR Secretary <u>BEFORE</u> June 1
<input type="checkbox"/>	Receive GWR Dues Invoice for 2018-2019	All clubs will receive the annual GWR dues invoice from the GWR Treasurer by May 1. Forms will also be available for download on the Golden West Region website http://www.goldenwestregion.org/	Pay <u>BEFORE</u> July 1
<input type="checkbox"/>	Submit SIA Form 200: Report of New Club Officers Submit GWR form of New Club Officers	Complete and submit Report of New Club Officers online to SIA Membership Forms Submit club president and club treasurer contact information to the GWR Secretary in the format identified by her.	Ensure this list is completed and submitted as soon as club officers are identified but <u>BEFORE</u> July 1
<input type="checkbox"/>	Prepare and approve club budget	Sample budgets can be found on the SIA website	Include funds for member attendance at Soroptimist events
<input type="checkbox"/>	Plan Soroptimist Summit: Access to Education event in your own community	Soroptimist Summit planning resources are available on GWR website	

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J U N E

<input type="checkbox"/>	Attend GWR Spring Conference	Attend the GWR Spring Conference!	Come, learn, celebrate and enjoy!
<input type="checkbox"/>	Receive GWR Club Information Update for 2018-2019	Submit club President and club Treasurer contact information sent to you by the GWR Secretary in May.	Complete and return to GWR Secretary BEFORE June 1
<input type="checkbox"/>	Pay GWR Dues for 2018-2019	All clubs will receive the annual GWR dues invoice from the GWR Treasurer by May 1. Forms will also be available for download on the Golden West Region website http://www.goldenwestregion.org/	Pay BEFORE July 1
<input type="checkbox"/>	Submit SIA Form 200: Report of New Club Officers Submit GWR form of New Club Officers	Complete and submit Report of New Club Officers online to SIA Membership Forms Submit club president and club treasurer contact information to the GWR Secretary in the format identified by her.	Ensure this list is completed and submitted as soon as club officers are identified but BEFORE July 1
<input type="checkbox"/>	Prepare and approve club budget	Sample budgets can be found on the SIA website	Include funds for member attendance at Soroptimist events
<input type="checkbox"/>	Celebrate your outgoing club board and committee members	Plan celebrations and thank yous for outgoing club board and committee members	Outgoing board and committee members remain in office through June 30
<input type="checkbox"/>	Celebrate and install your 2018-2019 club board and committee members	Plan celebration and installation for incoming club board and committee members	New board and committee members take office July 1
<input type="checkbox"/>	Start submitting Soroptimist Celebrating Success Award applications	Soroptimist Celebrating Success recognizes outstanding club projects and best practices in each of the four areas of the SIA Strategic Plan: program, members, public awareness, and fundraising. Get forms and instructions at GWR website Soroptimist Celebrating Success Submit projects or practices started or completed during the 2017-2018 calendar year	Send to SCS Chair by September 30