

CLUB SECRETARY/TREASURER

Congratulations! You have been selected to serve in a role that is vital to your Club. The reports you generate will provide information on what activities your Club does throughout the year, the minutes and notes you take will serve as the records for the Club Board meetings, and the dues you process will enable your Club and Club Members to be in good standing with Optimist International.

Working with the Club President, you will be involved in virtually every project and program that your Club chooses to do.

	Learn about your resources	<p>Become familiar with:</p> <ul style="list-style-type: none"> • Your role and duties (link) • Membership recruitment and retention • Recognition Handbook (link) • Optimist Supply sources (link) • Fax on Demand Document Retrieval System (link) • Website information at “optimist.org”, “optimistleaders.org” and “optimistmail.org” (links)
	Helpful Hints	<ul style="list-style-type: none"> • Read all mail from the District and Optimist International throughout the year. • Keep good records to pass along to your successor.
April / May	Register for Optimist International Convention	You will receive considerable training at the International Convention and should take advantage of the opportunity to interact with fellow Optimists from throughout the world. Early bird registration rates end April 15. Register for Convention and housing.
July	Attend International Convention	Attend Club Secretary/Treasurer training sessions and participate in the Convention.
August / September	Attend District Convention	<p>Key training will be provided at your District Convention. Attend all sessions prepared for Club Secretary/Treasurers. The training will include a brief overview of forms you will be required to submit on behalf of your Club throughout the year, including:</p> <ul style="list-style-type: none"> • Activities and Achievements Report – A District form that reports Club activities and involvement for District-wide competition and reporting. • Club Roster Adjustments – Used to add or delete members, and to submit changes in names, addresses, or Club officers. (link) • Club Officer-Elect Report – Reports election results for existing (due to International by May 20, due to District

		<p>earlier) and new Clubs. (link)</p> <ul style="list-style-type: none"> • Form 990 (U.S. Clubs) – IRS requirement if gross receipts exceed \$25,000 for Club – Due February 15 (link) • Club entry forms to programs such as District Essay Contest, District Oratorical Contest, Tri-Star sports contests, etc. – separate form for each. • Community Project Awards – Entry of youth or community service projects in District competition – Due September 30 (link) <p>Reports that will be submitted following September 30 of you year include:</p> <ul style="list-style-type: none"> • Annual Club Activities Report – Reports activities sponsored by your Club or in which your Club participates – Due October 10 (link) • Annual Activity Awards Application – Submitted to verify your Club has earned banner patches for meeting criteria in areas of serving youth and community – Due October 10 (link)
October	Roster and Bylaws	Duplicate and distribute the latest Club roster and Bylaws.
	Order Supplies	Order basic supplies from Optimist Supply sources. Observe inventory levels on needed items and consult with others responsible for specific materials and programs to determine their supply needs. You will need to order supplies throughout the year and this can be done through the Optimist website (link to supply source on website)
	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	Your responsibilities include: <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President’s signature

		<p>for the following membership activity:</p> <ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
	Generate Membership Dues Statements	In compliance with your Club Bylaws and policies, generate and mail Dues Statements to each Club Member. Follow up on non-payment as outlined in Club Bylaws and policies.
	Optimist International Dues	Pay first installment of Optimist International dues.
	District Dues	Pay first installment of District dues.
October / November	Attend 1 st Quarter District Conference	
November	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	<p>Your responsibilities include:</p> <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	<p>As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity:</p> <ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
December	JOOI Dues – December 15 deadline	If Club sponsors a JOOI Club: sponsorship dues and JOOI membership dues must be paid by December 15.
	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	<p>Your responsibilities include:</p> <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in

		<p>advance of each meeting.</p> <ul style="list-style-type: none"> Record and maintain minutes of all Board Meetings. Give financial report.
	Submit Club Roster Adjustments	<p>As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity:</p> <ul style="list-style-type: none"> New Members added Member deletions Address change Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
January	Optimist International Dues	Pay second installment of Optimist International dues.
	District Dues	Pay District dues. (If District bills in 4 increments.)
	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	<p>Your responsibilities include:</p> <ul style="list-style-type: none"> Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. Record and maintain minutes of all Board Meetings. Give financial report.
	Submit Club Roster Adjustments	<p>As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity:</p> <ul style="list-style-type: none"> New Members added Member deletions Address change Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
January / February	Attend 2 nd Quarter District Conference	
February	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	<p>Your responsibilities include:</p> <ul style="list-style-type: none"> Mail agenda for Board Meeting to officers,

		<p>Directors and Chairs at least one week in advance of each meeting.</p> <ul style="list-style-type: none"> • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	<p>As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity:</p> <ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
	Form 990 (U.S. Clubs) – February 15 deadline	Submit Form 990 (U.S. Clubs) – IRS requirement if gross receipts exceed \$25,000, for Club in first year
	Submit District Essay Contest Entry Form and Entry Fee -- February 28 deadline	Submit District Essay Contest Entry and fee to District Essay Chair. (link to site)
March	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	<p>Your responsibilities include:</p> <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	<p>As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity:</p> <ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
March / April	Generate Membership Dues Statements	In compliance with your Club Bylaws and policies, generate and mail Dues Statements to each Club Member. Follow up on non-payment as outlined in Club Bylaws and policies.

April	Optimist International Dues	Pay third installment of Optimist International dues.
	District Dues	Pay District dues. (If District bills in 2 or 4 increments.)
	Register for Optimist International Convention Registration	Early bird registration rates end April 15. Register for convention and housing.
	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	Your responsibilities include: <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity: <ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change Remember to enclose necessary processing fee with enrollments. (link to form)
April / May	Attend 3 rd Quarter District Conference	
May	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	Your responsibilities include: <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity: <ul style="list-style-type: none"> • New Members added • Member deletions

		<ul style="list-style-type: none"> • Address change • Officer change Remember to enclose necessary processing fee with enrollments. (link to form)
	Officer-Elect Report Due to Optimist International – May 20 deadline (link to form)	
June	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	Your responsibilities include: <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President’s signature for the following membership activity: <ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change Remember to enclose necessary processing fee with enrollments. (link to form)
July	Optimist International Dues	Pay fourth installment of Optimist International dues.
	District Dues	Pay District dues. (If District bills in 4 increments.)
	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	Your responsibilities include: <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President’s signature for the following membership activity:

		<ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
	Attend International Convention	Club Officers, Officers-elect, and Club members are encouraged to attend the International Convention. The Convention is an opportunity to interact with fellow Optimists, receive training, select the International President and International President-elect for the following year, and have your Club's voice heard about amendments and policies before the Convention attendees.
August	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	<p>Your responsibilities include:</p> <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers, Directors and Chairs at least one week in advance of each meeting. • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	<p>As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity:</p> <ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
August / September	Attend District Convention	Club Officers, Officers-elect, and Club members are encouraged to attend the District Convention. The Convention is an opportunity to interact with fellow Optimists, receive training, and select the Governor and Governor-elect for the following year.
	Club Meetings	Maintain notes of Club Meetings. Work on attendance records and other meeting needs.
	Monthly Board Meetings	<p>Your responsibilities include:</p> <ul style="list-style-type: none"> • Mail agenda for Board Meeting to officers,

		<p>Directors and Chairs at least one week in advance of each meeting.</p> <ul style="list-style-type: none"> • Record and maintain minutes of all Board Meetings. • Give financial report.
	Submit Club Roster Adjustments	<p>As members are added or deleted, submit Club Roster Adjustment to Optimist International, Member Services with Club President's signature for the following membership activity:</p> <ul style="list-style-type: none"> • New Members added • Member deletions • Address change • Officer change <p>Remember to enclose necessary processing fee with enrollments. (link to form)</p>
September	Community Projects Award Booklets – September 30 deadline	<p>Entry of Youth or Community Service Projects in District competition must be submitted no later than September 30. Submission of the CPA is a requirement of Honor and Distinguished Club. (link)</p>
	Club Roster Adjustment Forms – Postmark no later than September 30	<p>Club Roster Adjustment Forms to be counted for current year must be postmarked by official post office no later than September 30. Those with later postmark or received after September 30 will count in next administrative year. Remember to enclose necessary processing fee with enrollments. (link)</p>
October	Annual Club Activities Report – October 10 deadline	<p>Report activities sponsored by Club or in which Club participates must be submitted to District Secretary/Treasurer. (link)</p>
	Annual Activity Awards Application – October 10 deadline	<p>Submit form to Optimist International in order for Club to earn banner patch for meeting criteria in areas of serving youth and community. (link)</p>