

# 2010-2011 DUE DATES AND SPECIAL EVENTS

CONSULT OFFICIAL FORMS FOR DISTRIBUTION REQUIREMENTS  
12/01/09

OFFICER	TITLE	DESCRIPTION	DUE DATES	INSTRUCTIONS
<b>DUE AS COMPLETED</b>				
Lieutenant Governor	Club Visitation Report	Lieutenant Governor visit each Club in Zone at regular Club meeting between 4/1 and 7/1	Due within 30 days of meeting	Lieutenant Governor to District Secretary-Treasurer
Lieutenant Governor	Zone Meeting Report	Lieutenant Governor should hold a Zone meeting each quarter	Postmarked no later than 30 days after each meeting	Lieutenant Governor to District Secretary-Treasurer
Club President	Club Foundation Rep Appointment Form	Report appointment of Club Foundation Representative (CFR)	Immediately upon appointment/submit updates, if any, as they occur	Club to Optimist International Foundation
Club President	New Club Building Progress Reports	Informs Optimist International & District of progress	Immediately following the follow-up meeting 90 days for completion or November 30 for Clubs built in September	Sponsor Club to Optimist International
Club President	New Club Building Sponsor Permission Request	Required to begin new club building process		Club President to Optimist New Club Building Dept
Club President	Certificate of Completion	Certifies completion of new Club	90 days after organizational date by November 30 or Clubs built in September	Sponsor Club to Optimist International

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Club President	Youth Appreciation	Provides Clubs an opportunity to recognize youth for their talents in the arts, athletics, academics, and for contributions to community	At the discretion of the Club	
Club President	Respect for Law/ Promotion of Non-Violence	This program inspires respect for the law among young people to encourage peace and harmony within communities all over the world.	At the discretion of the Club	
Club Secretary-Treasurer	Club Roster Adjustments	Adds, deletes, changes in names, addresses, or offices of Club member	IMMEDIATELY after change occurs	Club to Optimist International along with payment if needed
Club Secretary-Treasurer Club President	Club Officer-Elect Report	If changes occur - report names and addresses of new Presidents-Elect and/or Secretary-Treasurer appointee	IMMEDIATELY after change occurs	Club to Optimist International
Club Secretary-Treasurer	Club Officer-Elect Report for New Clubs		Due Before September 30	Club to Optimist International
JOOI Advisor or Club Chair	Club Roster Adjustments (JOOI)	Adds, deletes, changes in name, address or office of a Club member	Immediately after change occurs	Submit to JOOI Clubs Department, Optimist International along with payment if needed
JOOI Club Advisor or Chair	JOOI Builder of Excellence	Recognizes both adults & JOOI members who build new JOOI Clubs	Paperwork submitted with new JOOI Club paperwork	Submit the JOOI Builder of Excellence upon completion to the JOOI Clubs Department, Optimist International

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JOOI Advisor or Club Chair	JOOI President's Citation	Created to recognize the many JOOI members who have made JOOI a major priority in their lives by devoting more time and energy to volunteer service than their fellow JOOI members	Each JOOI Club may submit one Club member for the President's Citation	Submit JOOI President's Citation Nomination Form and supporting materials to JOOI Department, Optimist International by April 1.
<b>SEPTEMBER 2010</b>				
All Members	Convention Housing Open	Book Hotel early for the Optimist International Convention. Rooms may be all booked up if you wait.	September 1	Members call Hotel Directly
Junior Golf District Chair	Tournament of Champions	Application deadline for eligible Tournament of Champions golfers	September 21	Junior Golf District Chair/ Participants apply directly to Optimist International
Club Secretary-Treasurer	President's Pride Report	Summation of the activities conducted by the Club during the year, organizations partnered with, funds raised and how many children served.	September 30	Club to Optimist International
<b>OCTOBER 2010</b>				

<b>OFFICER</b>	<b>TITLE</b>	<b>DESCRIPTION</b>	<b>DUE DATES</b>	<b>INSTRUCTIONS</b>
District Secretary-Treasurer	District Convention Board Meeting Minutes 4 <sup>th</sup> Quarter Executive Committee Meeting Minutes	Board and Executive Committee Meeting Minutes	No later than October 31	District Secretary-Treasurer to Optimist International
Lieutenant Governor	Annual Club Review	Review of each Club in Zone by Lieutenant Governor	Postmarked no later than October 10 following his/her year	Lieutenant Governor to District Secretary-Treasurer
District Activities Chair	District CPA Entry Form	Districts record the names and numbers of all submitting clubs in the District competition along with the categories in which they entered the CPA books.	October 20	Submit to Optimist International. Signed by both the District Activities Chair and the District Governor
Junior Golf District Chair	Tournament of Champions Registration	Registration Deadline for accepted Tournament of Champions golfers	October 19	Junior Golf District Chair/ Participants to Optimist International
Club Secretary-Treasurer	District Dues Billing	Club dues owed District	30 days after receipt	Club pays dues to District Secretary-Treasurer
Club Secretary-Treasurer	International Dues Billing	Club dues owed Optimist International	Upon Receipt	Club pays Optimist International
JOOI District JOOI Club Chair or JOOI Governor	Distinguished JOOI Governor Award	Recognizes each JOOI Governor whose District fulfills the requirements outlined in the JOOI Clubs Planning Guide	No later than September 30	District JOOI Clubs Chair to JOOI Clubs Department, Optimist International Application, New Club Follow-Up Form, District Conference Report and quarterly bulletin or newsletter must be Submitted
JOOI District JOOI Clubs Chair	District Chairman's Excellence Award	Recognizes a District JOOI Club Chair for outstanding efforts to	No later than September 30	District JOOI Club Chair to the JOOI Clubs Department,

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		complete all District responsibilities		Optimist International Application, New Club Follow-Up Form, District Conference Report and all Club maintenance forms must be submitted
JOOI Club Advisor or Club Chair	Membership Rosters (JOOI)	List of Club members		Submit roster form with membership dues payment to JOOI Clubs Department, Optimist International
JOOI Sponsor Club Secretary-Treasurer (sent to Advisor or Club Chair (for membership)	Annual Billing (JOOI)	Invoices are sent to the Secretary-Treasurer of the sponsoring Optimist Club for the registration and Club membership dues for their JOOI Club	Invoices are sent out in October. The Club has 30 days from the date posted on the invoice to send their payment.	A copy of the invoice, roster & election report (if they have not already been turned in) must be submitted to the JOOI Clubs Department
<b>NOVEMBER 2010</b>				
Junior Golf District Chair	Tournament of Champions	Registered Tournament of Champions compete Orange County National	November 7-8	
Lieutenant Governor	Annual Club Planning Conference Report	Lieutenant Governor conducts for each Club in Zone at a meeting of Club's Board of Directors	Postmarked no later than November 15	Lieutenant Governor to District Secretary-Treasurer
<b>DECEMBER 2010</b>				
District Activities Chair	District First Place Entry Form	Lists all first place winning CPA	December 15	District Activities Chair to

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	& District winner CPA Books	Books		Optimist International
Club Secretary-Treasurer	Club Roster Adjustment (CRA) Form	All adds & deletes due prior to January dues billing	Received at Optimist International No Later Than December 31	Club Secretary-Treasurer to Optimist International along with payment if needed
JOOI Club Advisor or Club Chair	TORCH	Magazine providing JOOI members with up-to-date information on Youth Club activities	December 1 for Winter 2009 issue	Submit suggestion or articles to the JOOI Clubs Department at Optimist International
<b>JANUARY 2011</b>				
District Secretary-Treasurer	1 <sup>st</sup> Quarter District Board Meeting Minutes 1 <sup>st</sup> Quarter District Executive Committee Meeting Minutes Budget & Review	Board & Executive Committee Meeting Minutes	January 31	District Secretary-Treasurer to Optimist International
Junior Golf District Chair	District Qualifying Tournament	All details (date, location, age divisions, etc.) must be submitted to OI Headquarters	January 31	District Junior Golf Chair to Junior Golf Department at Optimist International
Club Secretary-Treasurer	District Dues Billing	Club dues owed District (some Districts only bill twice per year in October & April)	30 days after receipt	Club pays dues to District Secretary-Treasurer
Club Secretary-Treasurer	International Dues Billing	Club dues owed Optimist International	Upon Receipt	Club pays Optimist International
Club Secretary-Treasurer	Magazine submissions	Clubs should submit color, action photos & brief summary of Club projects.	January 15 for Spring 2012 issue	Club to Optimist International

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JOOI Governor or District JOOI Clubs Chair	New Club Building Scholarship (JOOI)	Recognizes JOOI Governors whose District charters the highest percentage of new JOOI Clubs above the District's established minimum growth quota. Earns a \$1,000 scholarship	January 30 of year serving as Governor	Submit application form to the JOOI Clubs Department
JOOI Governor or District JOOI Clubs Chair	Club Services Award Scholarship (JOOI)	Recognizes the JOOI Governor who has the highest percentage of Clubs submitting election reports, rosters & applying for the awards program Earns a \$1,000 scholarship	January 30 of year serving as Governor	Submit application form to the JOOI Clubs Department
JOOI Governor or District JOOI Clubs Chair	Governor of Excellence (JOOI)	Recognizes the JOOI Governor who excels in both scholarship categories. Earns a \$2,000 scholarship	January 30 of year serving as Governor	Submit application form to the Youth Clubs Department
	Community Projects Awards (CPA)	International CPA judging takes place in St. Louis	January or February	
<b>FEBRUARY 2011</b>				
District Secretary-Treasurer	IRS Form 990	All US Districts required to file, even if they gross under \$25,000	February 15	District Secretary-Treasurer to IRS with a copy to Optimist International
Club Secretary-Treasurer	Form 990	IRS requirement if <u>gross</u> \$25,000 or more	February 15	Club to IRS, as required
Club Secretary-Treasurer	District Essay Contest Entry Form & Entry Fee (if applicable)	Submit the winning Essay to the District Essay Chair.	February 28	Club to District Essay Chair

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JOOI Club Advisor or Club Chair	TORCH	Magazine providing JOOI members with up-to-date information on Youth Club activities.	February 15 for Spring 2009 issue	Submit suggestion or articles to the JOOI Clubs Department at Optimist International
<b>MARCH 2011</b>				
Club Secretary-Treasurer	Club Roster Adjustment (CRA) Form	Submit all adds & deletes prior to April dues billing	Received at Optimist International No Later Than March 31	Club Secretary-Treasurer to Optimist International along with payment if needed
Club Secretary-Treasurer	Magazine submissions	Clubs should submit color, action photos & brief summary of Club projects`	March 1 for Summer 2012 issue	Club to Optimist International
<b>APRIL 2011</b>				
District Secretary-Treasurer	2 <sup>nd</sup> Quarter District Board & Executive Committee Meeting Minutes	Board & Executive Committee Meeting Minutes	April 30	District Secretary-Treasurer to Optimist International
District Essay Chair	District Essay Contest Winner's Information Form District Essay Contest Entry Form Copy of Winner's Birth Certificate District Winning Essay (with cover page re-attached)	Submit the District's first place Essay to Optimist International	April 15	District Essay Chair to Optimist International



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Club Secretary-Treasurer	District Dues Billing	Club dues owed District	30 days after receipt	Club pays dues to District Secretary-Treasurer
Club Secretary-Treasurer	International Dues Billing	Club dues owed Optimist International	Upon Receipt	Club pays Optimist International
All Members	Convention Registration	Optimist International Convention registration	May 1 (Early Bird Rate)	Members send form to Optimist International or register online by visiting the convention page of <a href="http://.optimist.org">.optimist.org</a>
JOOI Club Advisor or Club Chair	Club Officer Elections (JOOI)		April 15 Report due by September 30	Club Submits Election report to the JOOI Clubs Department, Optimist International, and the District JOOI Club Chair
JOOI Club Advisor or Club Chair	TORCH	Magazine providing JOOI members with up-to-date information on JOOI Club activities	April 15 for Summer 2009 issue	Submit suggestion or articles to the JOOI Clubs Department, Optimist International
<b>MAY 2011</b>				
All Members	Convention Registration	Optimist International Convention registration forms	May 1 (Early Bird Rate)	Members send form to Optimist International or register online by visiting the convention page of <a href="http://.optimist.org">.optimist.org</a>
Club Secretary-Treasurer Club President	Club Officer-Elect Report	Names and addresses of Presidents-Elect and Secretary-Treasurer	Postmarked by May 20	Club to Optimist International

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		appointee		
JOOI Club Advisor or Chair	Ruby Blair JOOI Member of the Year Award	International award recognizing one JOOI member as the outstanding member of the JOOI organization and a \$2,000 scholarship	Due no later than May 30  Winners to be recognized at the International JOOI Convention	Application and any support materials must be submitted to the JOOI Clubs Department, Optimist International
JOOI Club Advisor or Chair	JOOI Member of Excellence Award	International award recognizing a JOOI member who shows dedication in the fields of JOOI Club involvement and community service. Winner receives \$2,000 scholarship.	May 30  Winner to be recognized at the International JOOI Convention	Application and support materials must be submitted to the JOOI Clubs Department at Optimist International
JOOI Club Advisor or Chair	Election/Information Sheet (JOOI)	Used to submit information on incoming Club officers	Clubs must elect officers each year by April 15  Report due by May 30	Club Submits Election report to the JOOI Clubs Department, Optimist International, and the District JOOI Club Chair
<b>JUNE 2011</b>				
All Members	Convention Registration	Pre-Registration	Postmarked by June 4	Members send form to Optimist International or register by visiting the convention page of <a href="http://www.optimist.org">www.optimist.org</a>
All Members	Convention Housing	Optimist International Convention Housing	Postmarked by June 6 (as long as rooms are available – may book up before this date)	Members to call Hotel directly
District Oratorical Chair	1. Winners Information Form	Submit the District's winners to	June 15	District Oratorical Chair to

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	2. District Entry Form 3. Birth Certificate 4. Typed copy of Speech	Optimist International		Optimist International
District CCDHH Chair	1. CCDHH Winner's Information Form 2. Official Zone/District Entry Form 3. Audiogram 4. Typed Presentation	Submit the Districts Winner to Optimist International	June 15	District CCDHH Chair to Optimist International
Junior Golf District Chair	Optimist International Junior Golf Championships Registration & Housing Forms	Registration forms need to be submitted for District golfers competing in Florida	June 30	District Junior Golf Chair/Participant to Optimist International
Club Secretary-Treasurer	Club Roster Adjustment (CRA) Form	Submit adds & deletes prior to July dues billing	Received at Optimist International No Later Than June 30	Club Secretary-Treasurer to Optimist International along with payment if needed
JOOI Club Members	JOOI Board of Directors Application	Application for potential candidates for the JOOI Board of Directors	June 1	Submit the application form and other required materials to JOOI Clubs Department, Optimist International
JOOI Club Advisor & Chair	International JOOI Convention Registration	Annual Convention which Clubs from all over the U.S., Canada & Caribbean come together for training and fellowship	Due prior to June 10	Submit registration forms to the JOOI Clubs Dept, Optimist International & housing forms to hotel
JOOI Club Advisor or Chair	JOOI Club Roster	Adds, deletes or changes in names of JOOI Club members	June 15	Club to JOOI Clubs Department
JOOI Club Advisor or Chair	JOOI Club Election Report	Report JOOI Club officers or changes in officers	June 15	Club to JOOI Clubs Department

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<b>JULY 2011</b>				
District Secretary-Treasurer	1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> quarter Financials of the District	Actual Expenses (Budget to Actual)	July 31	District Secretary-Treasurer to Optimist International
District Secretary-Treasurer	3 <sup>rd</sup> Quarter District Board & Executive Committee Meeting Minutes	Board & Executive Committee Meeting Minutes	July 31	District Secretary-Treasurer to Optimist International
Junior Golf District Chair	Optimist International Junior Golf Championships (OIJGC)	Top finishers in each districts' qualifiers compete in championship	10-15 year olds - July 22-27 16-18 year olds - July 27-Aug 1	
Junior Golf District Chair	Eligible Tournament of Champions Golfers	Submit names, addresses & emails of boys & girls 14-15 and 16-18 District winners & runners-up to Optimist International	July 31	Junior Golf District Chair completes Tournament of Champions Eligible Golfers Form
Club President	Convention	International CPA winners are recognized at the International Convention	July	
Club Secretary-Treasurer	District Dues Billing	Club dues owed District (some Districts only bill twice per year in October & April)	30 days after receipt	Club pays dues to District Secretary-Treasurer
Club Secretary-Treasurer	International Dues Billing	Club dues owed Optimist International	Upon Receipt	Club pays Optimist International

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Club Secretary-Treasurer	Magazine submissions	Clubs should submit color, action photos & brief summary of Club projects`	July 15 for Fall 2011 issue	Club to Optimist International
<b>AUGUST 2011</b>				
Governor-Elect	Convention Ambassador	Provide Optimist International your recommendation for Convention Ambassador to promote the International Convention in Baltimore, MD	September 15	Submit name to Meeting Services Department at <a href="mailto:@optimist.org">@optimist.org</a>
JOOI District Youth Clubs Chair	JOOI District Conference Report	Provides election results of all JOOI District officers. The submission of this report provides the District the ability to be reimbursed for holding a conference based on the District's membership total and fund availability	Must be held by August 15 Report Deadline September 1	Submit report to JOOI Clubs Department, Optimist International
Club President	President's Citation	One member per Club may be recognized as an "Outstanding Optimist Club Member"	August 31	Club President to Awards Department, Optimist International
JOOI Club Advisor or Club Chair	TORCH	Magazine providing JOOI members with up-to-date information on JOOI Club activities	August 15 for Fall 2009 issue	Submit suggestion or articles to the JOOI Clubs Department, Optimist International
<b>SEPTEMBER 2011</b>				

<b>OFFICER</b>	<b>TITLE</b>	<b>DESCRIPTION</b>	<b>DUE DATES</b>	<b>INSTRUCTIONS</b>
Club Secretary-Treasurer	Community Projects Awards	Entry of Community Service or Fundraising Projects in District Competition	September 30	Club to District Activities Chair
Club Secretary-Treasurer	Club Roster Adjustment (CRA) Forms	Submit adds & deletes prior to October dues billing	Must be POSTMARKED By September 30	Club Secretary-Treasurer to Optimist International along with payment if needed
JOOI District JOOI Clubs Chair	JOOI District Conference Report	Provides election results of all JOOI District officers. The submission of this report provides the District the ability to be reimbursed for holding a conference based on the District's membership total and fund availability	Report Deadline September 1	Submit report to JOOI Clubs Department, Optimist International
JOOI Club Advisor or Chair	Club Project Awards	Offer JOOI Clubs the opportunity to submit their projects for judging and international recognition in the categories of citizenship, fundraising and joint-projects with sponsoring Optimist Club	No later than September 30	All entries must be submitted on the Club Project Form in JOOI Planning Guide
JOOI Club Advisor or Chair	Honor Club Award (JOOI)	Recognizes the JOOI Clubs that recruit new members, keep good records and conduct volunteer projects	No later than September 30	Application and support materials must be submitted to the JOOI Clubs Department, Optimist International
JOOI Club Advisor or Chair	Distinguished Honor Club Award (JOOI)	Recognizes Clubs that have met the requirements of Honor Club and have gone the extra step of building a new JOOI Club	No later than September 30	Application and support materials submitted to the JOOI Clubs Department, Optimist International

