*This is just an example. It’s not a complete list, and some of these items may not apply to you.  
See instructions on back.*

|  |  |
| --- | --- |
| **October**   * Prepare Annual Report | **April**   * Form President election committee if applicable * Ozanam Sunday – last Sunday of April |
| **November**   * Annual report to District Council | **May**   * Conference Retreat * May 9th - St. Louise de Marillac Feast Day |
| **December**   * Solidarity contribution to Council or to St. Louis | **June**   * Elect incoming President * Insurance renewal due |
| **January**   * Prepare 1099 forms for submission to IRS * Annual report summary to pastor and mail donation confirmation letters to donors | **July**   * Standards of Excellence review |
| **February**   * February 7th – Blessed Rosalie Rendu Feast Day * 990 due Feb 15th (if applicable) | **August**   * Organize Invitation to Serve member recruitment program |
| **March**   * Self-audit | **September**   * September 9th – Blessed Frederic Ozanam Feast Day * September 27th – St. Vincent de Paul Feast Day |
| And while you’re doing all this, remember to: ”Rejoice always. Pray without ceasing.  In all circumstances give thanks, for this is the will of God for you in Christ Jesus.”*1 Thessalonians 5:16-17* | |

**Notes on Creating a Calendar for your Conference**

The annual calendar is a convenient way to provide a checklist of what needs to be done when. Planning annually will help you spread the administrative work out across the fiscal year. Below you’ll find suggestions on how to develop an annual plan using this calendar template. You can find further discussion in the “Survival Kit for Conference Presidents” webinar, which can be found on the National Website under Leadership Training.

Note: The annual calendar is most useful if it fits on one page. Therefore, Conference meetings, food pantry schedules, and the like generally are not included on this calendar.

STEP 1: Add activities whose dates are set by **the IRS, your upper Council(s), your state, and/or your bylaws**. These are required activities with due dates out of your control.  
Here’s some ideas. If you’re not sure whether one applies to you, check with your Council.

* Annual report to District Council
* Solidarity contribution to District Council
* 1099s filed by Jan 31.
* 990 filed on time (if applicable)
* End-of-year donation receipts (unless all donations are receipted when received)
* If applicable, presidential election. This should be May or June.
* Start of new fiscal year. (October 1 for most Conferences)
* Administration specific to your Conference or Council – for instance, insurance payment or renewing your state licensing.

STEP 2: Add activities whose dates are set **by your Conference**.

Here’s some ideas. If you’re not sure whether one applies to you, check with your Council.

* Key fundraiser dates (Friends of the Poor run, dinner event, etc.)
* Special project dates (coat drives, back to school drive, etc.)
* Invitation to Serve (recruit new members)
* Mass together, retreats, recommitment ceremonies. One of our SVDP Feast Days might be a good choice.
* Quarterly or annual report to your pastor or parish
* District council meetings
* Anything else you like to do!

STEP 3: Add activities whose dates change year to year. These will need regular updates.

* District Council meetings
* Ozanam Orientation
* Regional or National meetings, webinars, District Council retreats.
* Safeguarding training.

STEP 4: Add the annual activities whose **dates are flexible.**Since you can choose the month for each one, try to spread them out over the year.

If you can’t do all of them in a single year, try doing half one year and the other half in the next year.

* Internal self-audit
* Standards of Excellence review.
* Records retention review.
* Review Conference policies and procedures.
* Conference Mass (Rule III Statute 9). Often held on or near one of the Feast Days listed in Statute 9.
* Commissioning and Renewal ceremony (Rule III Statute 4). Often done during the Conference Mass.

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