



## FORMS SCHEDULE & GUIDELINES

Every club in the organization is required to handle a certain amount of paperwork. However, in the past few years, Sertoma has dramatically cut back on forms.

It is the secretary's responsibility to complete the reports, but it is important that the president and secretary work together in ensuring that all of the pertinent data has been secured and is provided as requested. Although the secretary completes the forms, the president is responsible for making sure that they are filed in a timely fashion.

The report forms are available in this Resource Section of the training DVD, in the Awards and Reports Section of the Club Manual CD, online at [www.sertoma.org](http://www.sertoma.org) or from Sertoma Headquarters.

<u>Form</u>	<u>Due Date</u>	<u>Send To</u>
Form 115: Membership Information	When change occurs <b>*Must be received by noon the last business day of the quarter to reflect on Dues Invoice.</b>	Sertoma Headquarters
Form 116: Quarterly Activities Report Director	1 <sup>st</sup> quarter – October 10 2 <sup>nd</sup> quarter – January 10  3 <sup>rd</sup> quarter – April 10 4 <sup>th</sup> quarter – July 10	Sertoma Headquarters Sertoma  District Governor
Form 117: Quarterly Dues Statement	1 <sup>st</sup> quarter – July 10 2 <sup>nd</sup> quarter – October 10 3 <sup>rd</sup> quarter – January 10 4 <sup>th</sup> quarter – April 10	Sertoma Director District Governor
Form 130: Club Officer Reporting Form Director	April 10 – or any time club information changes	Sertoma Headquarters Sertoma  District Governor

## **FORM 115: MEMBERSHIP INFORMATION (Add/Delete/Change)**

This form is used to report membership adds, deletions and changes to Sertoma Headquarters.

Forward to Sertoma as necessary, prior to the end of the quarter.

FAX: (816) 333-4320

Or mail to: Sertoma  
1912 East Meyer Blvd.  
Kansas City, MO 64132

Or email to [infosetoma@sertomahq.org](mailto:infosetoma@sertomahq.org)

Or changes may be made online at [www.sertoma.org](http://www.sertoma.org)

**All changes received before noon on the last business day of the quarter will be reflected on the following Dues Invoice.**

**No adjustments to a Dues Invoice are allowable after the billing process has been run.**

## **FORM 116: QUARTERLY ACTIVITIES REPORT**

Report club sponsorships, fundraising and volunteer hours for the quarter.

Distribute as indicated on the form, by the dates indicated.

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Kansas City, MO 64132

Or email to [infosetoma@sertomahq.org](mailto:infosetoma@sertomahq.org)

Or changes may be made online at [www.sertoma.org](http://www.sertoma.org)

**This information may also be submitted online. See the online instructions in this Resource Section.**

## **FORM 117: QUARTERLY DUES STATEMENT**

Include this form when remitting dues to District Governor and Sertoma Director.

**It is not necessary to send this form to Sertoma Headquarters.**

## **FORM 130: CLUB OFFICER REPORTING FORM**

Form is due to District Governor, Sertoma Director and Sertoma Headquarters by April 10, following club elections of new officers.

FAX: (816) 333-4320

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Kansas City, MO 64132

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Or changes may be made online at [www.sertoma.org](http://www.sertoma.org)

**This form is also used to report any changes affecting club officers or meeting information. If a change occurs during the administrative year, use a copy of this form to report the information to the distribution list. Any change should be reported immediately to ensure continuing communication with your club.**