

## Rotary Club Presidents Checklist

Advanced preparation will help you in successfully meeting your goals in the coming year and fully maximizing the potential of your Club.

- \_\_\_ Arrange for a joint meeting of the incoming board of directors with the outgoing board
- \_\_\_ Appoint Committee Chair Person, set goals for each committee. Encourage communication between club and district committees. Review activities, goals, and expenditures, and participate in decisions.
- \_\_\_ Conduct a Strategic Planning meeting to review and make necessary updates to your Clubs Strategic Plan. If your Club does not currently have a strategic plan, work with your board on creating one, if you need assistance reach out to your Assistant Governor for examples from other clubs.
- \_\_\_ Supervise the preparation of a club budget and proper accounting practices, including an annual financial review. **Complete by July 1st**
- \_\_\_ Ensure your secretary and treasurer have an account on My Rotary and can access their DACdb account to update membership and club data regularly. **Complete as soon as possible**
- \_\_\_ Collaborate with the governor and assistant governor on club and district matters
- \_\_\_ Communicate important information from the governor and Rotary International to club members.
- \_\_\_ Work with your assistant governor and neighboring club presidents on choosing a date and venue for the joint meeting for the district governor's required visit. **Complete as soon as possible.**
- \_\_\_ Prepare for the district governor's required visit by completing the questionnaire with your board. **Complete at least 2 weeks before governor's visit**
- \_\_\_ Review and ensure that your club follows Rotary's youth protection policies and the Statement of Conduct for Working With Youth, and implement the requirements for the Youth Exchange program
- \_\_\_ Plan and lead monthly board meetings
- \_\_\_ Plan and lead interesting and relevant Club meetings, as well as organizing fun social events and community projects
- \_\_\_ Ensure that comprehensive training is conducted for club members, as needed
- \_\_\_ Involve members in carrying out your club's goals, outlined in Rotary Club Central, enter and track your club's goals in Rotary Club Central. **Have goals entered by July 1<sup>st</sup>, monitor throughout the year.**
- \_\_\_ Encourage members to attend district meetings, functions, other clubs functions and promote the Rotary International Convention.
- \_\_\_ Attend the district conference, encourage other members of your club to attend
- \_\_\_ Submit an annual report to your club on the club's status before leaving office, work with your successor on all the above before leaving office.
- \_\_\_ Enter incoming President and Vice President in DACdb. **Complete by December**
- \_\_\_ Arrange for a joint meeting of the incoming board of directors with the outgoing board.

Please make sure to reach out to your Assistant Governor with any help you may need with anything above, as well as any other help you may need.