

Presidential Checklist

Name:	
Club:	

CHECKLIST

<u>Appoint and Direct the Club Leadership Team</u>		
<input type="checkbox"/>	Supervise the preparation of a club budget and proper accounting practices, including an annual financial review	Start Now
<input type="checkbox"/>	Encourage incoming club officers to attend the Vibrant Club Training	
<input type="checkbox"/>	Set goals for each committee. Encourage communication between club and district committees. Review activities, goals, and expenditures, and participate in decisions	Start Now
<input type="checkbox"/>	Follow Rotary's youth protection policies and the Statement of Conduct for Working with Youth, and implement the requirements for the Youth Protection Program	
<u>Using the Rotary.org website</u>		
<input type="checkbox"/>	Create an account on My Rotary	Start Now
<input type="checkbox"/>	Make sure your secretary and treasurer have an account on My Rotary to update membership and club data regularly. In RIBI use the Data Management System (DMS).	Start Now
<input type="checkbox"/>	Ensure all club officers are reported on My Rotary so they can receive important information and communications	Start Now
<input type="checkbox"/>	Ensure all club officers are reported on DACdb so they can receive important information and communications	Start Now
<input type="checkbox"/>	Set and track goals for your club in Rotary Club Central on My Rotary	Before May 1, 2020
<input type="checkbox"/>	Track your club's goals in Rotary Club Central – Involve Members	Ongoing
<u>Working with the District Leadership</u>		
<input type="checkbox"/>	Prepare for the District Governor's required visit	
<input type="checkbox"/>	Collaborate with the governor and assistant governor on club and district matters	
<input type="checkbox"/>	Communicate important information from the governor and Rotary International to club members	
<input type="checkbox"/>	Encourage members to attend district meetings, and promote the Rotary Convention	
<input type="checkbox"/>	Attend the district conference	
<u>Club Administration</u>		
<input type="checkbox"/>	Consult the club president on the current status of the club	
<input type="checkbox"/>	Appoint committee chairs and a trainer for your year	

<input type="checkbox"/>	Supervise the treasurer in the preparation of a club budget	
<input type="checkbox"/>	Plan and lead monthly board meetings	
<input type="checkbox"/>	Ensure that comprehensive training is conducted for club members, as needed	
<input type="checkbox"/>	Present an annual report to your club on the club's status before leaving office	
<input type="checkbox"/>	Work with your successor before leaving office	
<input type="checkbox"/>	Arrange for a joint meeting of the incoming board of directors with the outgoing board	
<input type="checkbox"/>	Member Compare in DACdb before invoices	December 2020 and June 2021
<u>Other Tasks</u>		
<input type="checkbox"/>	Rotary Direct for club	
<input type="checkbox"/>	Get 2 RYLA Participants before December 5	December 5, 2020
<input type="checkbox"/>	Put fun content on social media	Monthly
<input type="checkbox"/>	Use DACdb for potential members – Keep DACdb updated	Weekly
<input type="checkbox"/>	Familiarize yourself and your club with the Rotary Learning Center	Start Now
<input type="checkbox"/>	Know and understand Rotary's Strategic Plan	Start Now
<input type="checkbox"/>	Update your club's Bylaws and Constitution	July- August, 2020
<u>Key Events to Plan for your Club</u>		
<input type="checkbox"/>	Installation of Club Officers	July 2020
<input type="checkbox"/>	World Polio Day	October 24
<input type="checkbox"/>	Giving Tuesday	Tuesday after Thanksgiving
<input type="checkbox"/>	New Member Orientation(s)	
<input type="checkbox"/>	Rotary Day	February 23
<input type="checkbox"/>	Club Assemblies (Minimum of 2)	
<u>Key Events to Attend</u>		
<input type="checkbox"/>	Grants Management/ Foundation Seminar	TBD -2020-21
<input type="checkbox"/>	Foundation Banquet	November 7, 2020
<input type="checkbox"/>	Pre-PETS	February 7-8, 2020
<input type="checkbox"/>	Attend your presidents-elect training seminar (PETS)	March 5-7, 2020
<input type="checkbox"/>	Rotary Leadership Institute (RLI)	See DACdb
<input type="checkbox"/>	District Training Assembly (Vibrant Club Training)	May 16, 2020
<input type="checkbox"/>	Governor's Induction and Installation of District Leadership	June 27, 2020
<input type="checkbox"/>	District Conference	May 14-16, 2021