

President's Comprehensive Checklist

(Note: Some line items may appear under more than one topic heading.)

An Early Start:

_____ **Confirm Form 130: Club Officer's Reporting Form sent to Sertoma**

_____ **Headquarters, Director, District Governor**

_____ **Review Club Bylaws & Policy Statements**

_____ **Review and Analyze Quarterly Reports**

_____ **Meet with outgoing executive committee**

_____ **Status of remaining/carry through projects**

_____ **Draft transition time table**

_____ **Currently planned events**

_____ **Installation, Awards, Recognitions**

_____ **Date for Club Leadership Conference**

_____ **Review New/Most Current Sertoma Club Manual**

_____ **Access/Review Training available on line at www.sertoma.org**

_____ **Review Sertoma Awards/Incentives for Individuals and Clubs**

_____ **Call meeting of new Executive Committee and Board of**

Directors

_____ **Review Responsibilities**

_____ **Seek inputs/concerns for coming year**

_____ **Consider Committee Chairs**

_____ **Build DRAFT Club Calendar**

_____ **Request members select committee choices**

_____ **Appoint Committee Chairs**

_____ **Fill Committee Assignments**

_____ **Define Club Goals**

_____ **Growth/Membership # _____**

_____ **Funds Raised/Member \$ _____**

_____ **Funds Donated/Member \$ _____**

_____ **Attend District Leadership Conference with Club Officers**

_____ **Conduct Club Leadership Conference**

_____ **Prepare Revised Club Calendar for Year**

Regular Preparations and Consistent Performance:

_____ **Regular Meetings**

filing after _____ **Design/use Regular Meeting Agenda** *(Give to Secretary for meeting)*

_____ **Greet and Introduce all guests and prospective members**

_____ **Emphasize Fun and Fellowship**

_____ **Share PAC Meeting information and news from District, and Sertoma Headquarters**

Region,

_____ **Start and end on time**

_____ **Executive Committee Meetings**

- _____ **Call as needed** (*Suggest quarterly*)
- _____ **Leadership Development Opportunity**

- _____ **Board Meetings scheduled regularly**
- _____ **Coordinate with Chairman of Board to plan Board**

Agendas

- _____ **Coordinate with Officers/Committee Chairs 3-5 days before meeting** (*Confirm Officer/Chair or sub will be at board meeting*)

- _____ **Request Officers and Committee Chair give agenda to Chairman of the Board.**

inputs

- _____ **Distribute Roberts Rules of Order, The Effective Board to Officers/Board**
- _____ **Start and end on time**
- _____ **Preside in absence of Chairman**

_____ **Communications**

- _____ **Keep current on Sertoma affairs**
- _____ **Share PAC Meeting information**
- _____ **Note items in sister club bulletins**
- _____ **Visit www.sertoma.org weekly**
- _____ **Subscribe to Sertoma News Service on line**
- _____ **Note items in Sertoman Magazine**
- _____ **Note items in Sertoma Digest**
- _____ **Interact with Officers and Committee Chairs twice**

monthly

- _____ **Appoint Bulletin Editor**
- _____ **Prepare President article for each bulletin**
- _____ **Appoint Publicity Person**

_____ **Finances**

- _____ **Call for audit on club records and financials**

_____ **Reports**

- _____ **Quarterly Activities**
- _____ **Quarterly Dues**

Leadership Development and Training:

- _____ **PAC (President Advisory Council) Meetings**
- _____ **Schedule on Calendar**
- _____ **Invite at least one Officer as guest to accompany you**
- _____ **Share club concerns and needs with PAC attendees**
- _____ **Promote Attendance at Conferences**
- _____ **Attend District Leadership Conference with Club Officers**
- _____ **Conduct Club Leadership Conference**
- _____ **Attend Fall District Conference (FDC) with Officers** (*If*

FDC held)

- _____ **Promote Attendance at Conventions**
- _____ **Attend Regional Convention with Club Officers**
- _____ **Attend Annual Sertoma Convention**
- _____ **Promote Participation in all Training Seminars**

Member Services:

- _____ **Submit new members within two days of approval by Board**
- _____ **Induct new members within two weeks of approval by Board**
- _____ **Complete Club Orientation for new members at least quarterly**
- _____ **Present Awards at meetings as soon as award earned**
- _____ **Coordinate with Awards Chair and Secretary on Member**

Awards

- _____ **Coordinate with District Governor if Club Awards not presented**

_____ **Committee Assignments**

- _____ **All members serving on at least one committee**
- _____ **New members assigned to committee at or soon after club orientation**

_____ **Leadership Development**

- _____ **Delegate tasks when possible**
- _____ **Request Officers explain their plans for year at Club Leadership Conference**

Board _____ **Request Committee Chairs give reports periodically at Meeting**

- _____ **Counsel, invite, mentor officers to attend PAC, Conferences, Conventions**

Mission Activities:

- _____ **Create an environment that encourages new ideas of service and sponsorship**

_____ **Publicity**

- _____ **Appoint Publicity Chair and committee. Help provide articles to submit.**

_____ **Meet local publisher/editor**

_____ **Prepare Club Public Service Announcement**

_____ **Foundation**

_____ **Be Foundation Supporter**

_____ **Submit Community Service Matching Grant Request**

_____ **Promoting Speech and Hearing projects and services**

Market Development:

_____ **Recruit a new member**

- _____ **Establish a Growth Attitude – Goal, Club Leadership Conference, Club Program**

_____ **Guest Procedures/Protocol**

_____ **Guest Packet, Letter, Follow-up, Re-invite, Ask to join**

_____ **Set Growth Goal estimating losses and gains needed to finish at target**

_____ **Have Membership Committee and/or CT present program on Market Development**

_____ **Develop a Growth Plan and commit it to paper and take action**

_____ **New Club Development Program – Is this the year to build a new club?**

Seeking Assistance:

_____ **Coordinate with District Governor between PAC Meetings**

_____ **Share constructive ideas for Sertoma by communicating with Governor and ID**

_____ **Use all resources: Experienced members, Past officers, District Governor, Certified Trainer, Ambassadors, Director, Sertoma Staff**

Ensuring Club Success:

_____ **Monitor progress to Club Goals**

_____ **Review Quarterly Activities Reports before submission**

_____ **Review Quarterly Dues Statement before submission**

_____ **Praise and show appreciation for jobs well done**

_____ **Be tactful in confronting problems**

_____ **Be receptive to new ideas**

_____ **Have integrity in all actions**

As Your Year Comes to an End:

_____ **Appoint Nominating Committee to ensure timely election of new officers**

_____ **Ensure Form 130: Club Officer Reporting Form submitted ASAP after election/before deadline**

_____ **Work with incoming officers to ensure smooth transition**

_____ **Ensure club records and financials are in order and ready for audit**

_____ **Ensure club is prepared to submit all year end incentive forms by deadline**

_____ **Prepare year end summary of club year to share with members**

_____ **Thank You for officers, board and chairpersons**

_____ **Review Chairman of Board responsibilities in preparation for next year**

