

## **CLUB PRESIDENT CHECKLIST**

Community service, that's what you came onboard to do! Your fellow Club Members have elected you to serve as their Club President. As President, you will not only serve your community, you will lead your Club Members in doing community service. You have a great opportunity to impact your Club and your community. As Club President, you will conduct regular Club meetings and monthly Club Board meetings, serve on the District Board and serve as the Club's representative at District and Zone meetings.

Ok, you've been elected now what do you?

### **Learn About Your Resources**

Become familiar with:

- Your role and duties
- New Club and JOOI Club building
- Membership recruitment and retention
- New member induction ceremonies
- Recognition Handbook
- Website information at "optimist.org", "optimistleaders.org" and "optimistmail.org"
- International Activities; the regulations/deadlines relative to scholarship competitions, President's Pride Report and other competitions

### **Helpful Hints**

- Check with your Club Secretary that all your information is on your Club roster correctly and completely including your email address
- Read all mail from the District and Optimist International and pass along the information from the publications to Club Members
- Take the time to complete the Club President online training at [www.http://optimisttraining.org/](http://optimisttraining.org/)
- Encourage all officers and Chairs to study materials found on [optimistleaders.org/teaching.cfm](http://optimistleaders.org/teaching.cfm) that would pertain to their position
- Show appreciation for every job performed by Members. A "pat on the back" goes a long way!
- If Club problems arise, discuss them at a meeting of the Board or consult District leaders or Optimist International staff
- Keep good records to pass along to your successor. Officers and Chairs should brief their counterparts in the succeeding administration.

### **Youth Appreciation**

Provides Club an opportunity to recognize youth for their talents in the arts, athletics, academics and for contributing to their community. Youth Appreciation activities can be scheduled at the discretion of the Club

Although the Optimist year begins in October you will need to start preparing for your tenure a few months before then. There are opportunities for you to receive training at many levels. So follow the provided checklist through your year to ensure you gave a great foundation to be a successful President for your Club, your community and the youth you serve.

## CLUB PRESIDENT CHECKLIST

APRIL/MAY	<input type="checkbox"/>	Register for Optimist International Convention	You will receive considerable training at the International Convention and should take advantage of the opportunity to interact with fellow Optimists from throughout the world. Early bird registration rates end May 1. An extension to the Early Bird deadline for a Club President Elect elected after May 1 will be considered and is subject to review. If unable to attend, take the club president online training at <a href="http://www.optimisttraining.org">www.optimisttraining.org</a> .
JUNE	<input type="checkbox"/>	Prepare your budget	In cooperation with the Secretary-Treasurer and Secretary-Treasurer Designate, begin developing the Club budget.
JULY	<input type="checkbox"/>	Attend International Convention	Attend Opening Ceremonies, all Business Sessions, special President-Elect training and select workshops to make the best use of your time at the Optimist International Convention. You will also benefit from and enjoy the networking and fellowship by attending featured events and optional meals.
JULY/AUGUST	<input type="checkbox"/>	Plan Your Year	<p>Plan a Club calendar. Include items such as:</p> <ul style="list-style-type: none"> <li>• Club meeting dates</li> <li>• Club Board meeting dates</li> <li>• Due dates for both District and Optimist International dues</li> <li>• Scheduled Zone Meetings</li> <li>• Scheduled District Conferences</li> <li>• Start and completion deadlines of known projects</li> <li>• Plan a fundraiser for the OI Foundation</li> <li>• Review, budget and raise necessary funds to attend the International Convention</li> </ul>
	<input type="checkbox"/>	Appoint your Committees and communicate roles and goals	<p>Appoint chairs and member to committees. Select Club Secretary-Treasurer and Club Foundation Representative and be prepared to request approval of those appointments at the October Board Meeting.</p> <p>Designate Specific responsibility of supervising a group of Committees to each Vice President and ask them to brief you on them monthly.</p> <p>Activate all committees and ask that they get planning underway to "hit the ground running" on October 1.</p> <p>Planning a strong program that includes membership recruitment and retention as well as new Club building is vital to the growth of your Club and our organization.</p> <p>Decide what activity you would like to plan in May for Optimist in Action month.</p> <p>In cooperation with Committee Chairs and Board, establish goals for the Club and encourage</p>

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		Chairs to develop plans for achieving goals.
	<input type="checkbox"/> Promote attendance at District Convention	Encourage Club officers and Club Members to attend the District Convention.
AUGUST / SEPTEMBER	<input type="checkbox"/> Attend District Convention	You will receive valuable training at the District Convention as well as have the opportunity to learn the goals of the District for the coming year. Participate in the workshops and build relationships to achieve goals in the coming year.
	<input type="checkbox"/> Status of Planning	Check with Chairs to ensure planning is underway. Check on the Membership Committee's plan for enrolling, inducting, educating and involving new members. Effective, impressive inductions are a MUST. New Club Building is a tremendous community service project. In cooperation with the NCB Chair, identify a site and register your intention on the New Club Database on <a href="http://optimistleaders.org">optimistleaders.org</a> . Begin the work now to bring the Club in during your year.
SEPTEMBER	<input type="checkbox"/> Prepare to conduct Board Meetings	As Club President, you preside over the Club Board meetings. <ul style="list-style-type: none"> <li>• understand the purpose of Boards and Board meetings</li> <li>• Schedule monthly Board meetings</li> <li>• Prepare and use an agenda for each monthly Board meeting</li> </ul> In addition to routine agenda items, business at the October Board meeting includes: <ul style="list-style-type: none"> <li>• Approval of Secretary-Treasurer selected by Club President</li> <li>• Approval of Club Foundation Representative</li> </ul>
	<input type="checkbox"/> Prepare to conduct Club meetings	You preside over all Club meetings, so be prepared to lead beginning with the first meeting in October. <ul style="list-style-type: none"> <li>• Prepare and use an agenda for each Club meeting</li> <li>• Have a program at each meeting</li> <li>• Do not conduct business at meetings. (Business should be handled in Committee and Board meetings. - Members should be invited to attend those meetings as well).</li> </ul>

## CLUB PRESIDENT CHECKLIST

SEPTEMBER / OCTOBER	<input type="checkbox"/>	Meet with Lt Governor	Your Zone Lt Governor is a valuable resource to you and your Club. As your direct link with Optimist International, the Lt Governor is ready to assist you in being a successful Club President. In order to know the goals of you and your Club, the Lt Governor will meet with you, your Board and the Committee Chairs you designate, to discuss the goals for the coming year. Together, you will complete an Annual Club Planning Conference report that enables Optimist International, your District Governor and Lt Governor to know the goals you aspire to achieve as well as the challenges you face.
	<input type="checkbox"/>	Conduct monthly Board meetings	<p>Agenda should include:</p> <ul style="list-style-type: none"> <li>• Monitor Club finances by requiring a financial report from the Secretary -Treasurer at each Board meeting</li> <li>• Review progress to goals established during the Annual Club Planning Conference and in accordance with the Recognition Handbook. Remember the Recognition Handbook is a measuring stick of accomplishments by your Club.</li> <li>• Review projects and programs underway, especially Essay Contest and Oratorical Contest planning.</li> </ul>
OCTOBER	<input type="checkbox"/>	Conduct club meetings	Make meetings fun, interesting and informative!
	<input type="checkbox"/>	Club Foundation Representative Appointment Form	Submit form to notify the Optimist International Foundation of your Club Representative
	<input type="checkbox"/>	Submit Club Roster Adjustments	As members are added or deleted, Club Secretary-Treasurer must submit Club Roster Adjustment (CRA) to Optimist International Member Services with Club President's signature or submit thru <a href="http://optimistleaders.org">optimistleaders.org</a> . If submitted via the website, remember to also print off any invoice this action generates as those invoices are not mailed to the Treasurer.
	<input type="checkbox"/>	Optimist International Dues	Insure Secretary-Treasurer pays first instalment of Optimist International dues.
	<input type="checkbox"/>	District Dues	Insure Secretary-Treasurer pays first instalment of District dues.
OCTOBER / NOVEMBER	<input type="checkbox"/>	Attend 1st Quarter District Conference	Attend and participate in workshops and Board meetings. Remember as the President of your Club you are also a Director on the District Board of Directors.

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NOVEMBER	<input type="checkbox"/>	Conduct Club meeting	Make meetings fun, interesting and informative!
	<input type="checkbox"/>	Conduct monthly board meeting	<p>Agenda should include:</p> <ul style="list-style-type: none"> <li>• Monitor Club finances by requiring a financial report from the Secretary -Treasurer at each Board meeting</li> <li>• Review progress to goals established during the Annual Club Planning Conference and in accordance with the Recognition Handbook. Remember the Recognition Handbook is a measuring stick of accomplishments by your Club.</li> <li>• Review projects and programs underway, especially Essay Contest and Oratorical Contest planning.</li> </ul>
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DECEMBER	<input type="checkbox"/>	Conduct Club meeting	Make meetings fun, interesting and informative!
	<input type="checkbox"/>	Conduct monthly Board meetings	<p>Agenda should include:</p> <ul style="list-style-type: none"> <li>• Monitor Club finances by requiring a financial report from the Secretary -Treasurer at each Board meeting</li> <li>• Review progress to goals established during the Annual Club Planning Conference and in accordance with the Recognition Handbook. Remember the Recognition Handbook is a measuring stick of accomplishments by your Club.</li> <li>• Review projects and programs underway, especially Essay Contest and Oratorical Contest planning.</li> </ul>
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JANUARY	<input type="checkbox"/>	Conduct Club meeting	Make meetings fun, interesting and informative!
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	<input type="checkbox"/>	Optimist International Dues	Insure Secretary-Treasurer pays second instalment of Optimist International dues.
	<input type="checkbox"/>	District Dues	Insure Secretary-Treasurer pays second instalment of District dues (if your District bills in a quarterly manner).
	<input type="checkbox"/>	Attend 2nd Quarter District Conference	Attend and participate in workshops and Board meetings. Remember as the President of your Club you are also a Director on the District Board of Directors.
FEBRUARY	<input type="checkbox"/>	Submit form 990 to IRS (U.S. Clubs) - February 15 deadline	Insure Secretary-Treasurer submits Form 990-IRS requirement if gross receipts exceed \$25,000, for Club in first year.
	<input type="checkbox"/>	Submit District Essay Contest Entry Form and Entry Fee - February 28 deadline	To be submitted by Club to District Essay Chair
	<input type="checkbox"/>	Start preparing your Reel Optimism submission	Reel Optimism opens for submissions on February 15th until April 15th. Many categories to enter your video submission.
	<input type="checkbox"/>	Conduct Club meeting	Make meetings fun, interesting and informative!
	<input type="checkbox"/>	Conduct monthly Board meetings	<p>Agenda should include:</p> <ul style="list-style-type: none"> <li>• Monitor Club finances by requiring a financial report from the Secretary -Treasurer at each Board meeting</li> </ul>

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		<ul style="list-style-type: none"> <li>• Review progress to goals established during the Annual Club Planning Conference and in accordance with the Recognition Handbook. Remember the Recognition Handbook is a measuring stick of accomplishments by your Club.</li> <li>• Review projects and programs underway</li> </ul>
		<input type="checkbox"/> Submit Club Roster Adjustments As members are added or deleted, Club Secretary-Treasurer must submit Club Roster Adjustment (CRA) to Optimist International Member Services with Club President's signature or submit thru <a href="http://optimistleaders.org">optimistleaders.org</a> . If submitted via the website, remember to also print off any invoice this action generates as those invoices are not mailed to the Treasurer.
MARCH	<input type="checkbox"/>	Conduct Club meeting Make meetings fun, interesting and informative!
	<input type="checkbox"/>	Conduct monthly Board meetings Agenda should include: <ul style="list-style-type: none"> <li>• Monitor Club finances by requiring a financial report from the Secretary -Treasurer at each Board meeting</li> <li>• Review progress to goals established during the Annual Club Planning Conference and in accordance with the Recognition Handbook. Remember the Recognition Handbook is a measuring stick of accomplishments by your Club.</li> <li>• Review projects and programs underway.</li> </ul>
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APRIL	<input type="checkbox"/>	Conduct Club meeting Make meetings fun, interesting and informative!
	<input type="checkbox"/>	Conduct monthly Board meetings Agenda should include: <ul style="list-style-type: none"> <li>• Monitor Club finances by requiring a financial report from the Secretary -Treasurer at each Board meeting</li> <li>• Review progress to goals established during the Annual Club Planning Conference and in accordance with the Recognition Handbook. Remember the Recognition Handbook is a measuring stick of accomplishments by your Club.</li> <li>• Review projects and programs underway.</li> </ul>

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	<input type="checkbox"/>	Submit Club Roster Adjustments	As members are added or deleted, Club Secretary-Treasurer must submit Club Roster Adjustment (CRA) to Optimist International Member Services with Club President's signature or submit thru <a href="http://optimistleaders.org">optimistleaders.org</a> . If submitted via the website, remember to also print off any invoice this action generates as those invoices are not mailed to the Treasurer.
	<input type="checkbox"/>	Optimist International Dues	Insure Secretary-Treasurer pays third instalment of Optimist International dues.
	<input type="checkbox"/>	District Dues	Insure Secretary-Treasurer pays third instalment of District dues (if your District bills in a quarterly manner).
	<input type="checkbox"/>	Optimist International Convention Registration	Early Bird registration rates end May 1. Members can request or download a registration form and send completed forms to Optimist International or register online. Forms and online registration are available at <a href="http://optimist.org/e/member/convention1.cfm">optimist.org/e/member/convention1.cfm</a> . An extension to the early bird deadline for Club President-Elect elected after May 1 will be considered and subject to review.
APRIL/MAY	<input type="checkbox"/>	Attend 3rd Quarter District Conference	Attend and participate in workshops and Board meetings. Remember as the President of your Club you are also a Director on the District Board of Directors.
MAY	<input type="checkbox"/>	Officer-Elect Report (COER) to Optimist International - May 20 deadline	Form can be easily found on <a href="http://optimistleaders.org">optimistleaders.org</a>
	<input type="checkbox"/>	Prepare to vote	Before the end of the month you will be receiving an email with your voting credentials. Keep this email in a safe place. Start researching the candidates for the International offices of President Elect, Board of Directors and Regional Vice President. The monthly Hotline that is emailed to you is a great place to start your research. Get a consensus from your Board on who your Club wishes to vote for.
	<input type="checkbox"/>	Optimists in Action month	Bring your members together for your planned service activity for Optimists in Action month.
	<input type="checkbox"/>	Optimist International Convention Registration	Early Bird registration rates end May 1. Members can request or download a registration form and send completed forms to Optimist International or register online. Forms and online registration are available at <a href="http://optimist.org/e/member/convention1.cfm">optimist.org/e/member/convention1.cfm</a> . An extension to the early bird deadline for Club President-Elect elected after May 1 will be considered and subject to review.
	<input checked="" type="checkbox"/>	Conduct Club meeting	Make meetings fun, interesting and informative!



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JUNE	<input type="checkbox"/>	Conduct Club meeting	Make meetings fun, interesting and informative!
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	<input type="checkbox"/>	International Elections, VOTE!	June is the month to cast your ballot on the Elections for International Office. As the President you are the delegate for your Club. An email has been sent to the email address listed on your Club Roster giving you directions and a code to cast your ballot. Positions that are possibly up for election would be the International President-Elect, International Board of Directors and Regional Vice President. Confer with your Board and cast your ballot to have your Club's voice heard.

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	<input type="checkbox"/>	Optimist International Dues	Insure Secretary-Treasurer pays fourth instalment of Optimist International dues.
	<input type="checkbox"/>	District Dues	Insure Secretary-Treasurer pays fourth instalment of District dues (if your District bills in a quarterly manner).
	<input type="checkbox"/>	Attend International Convention	Club Officers, Officers-Elect and Club Members are encouraged to attend the International Convention. The Convention is an opportunity to interact with fellow Optimists, receive training, vote on bylaws and have your Club's voice heard about amendments and policies before the Convention attendees.
AUGUST	<input type="checkbox"/>	President's Citation - August 31 deadline	One member per Club may be recognized as an "Outstanding Optimist Club Member". Club President is to submit the request form to Recognition Department of Optimist International.
AUGUST / SEPTEMBER	<input type="checkbox"/>	Attend District Convention	Club Officers, Officers-Elect and Club Members are encouraged to attend the District Convention. The Convention is an opportunity to interact with fellow Optimists, receive training, and select the Governor and Governor-Elect for the following year.
SEPTEMBER	<input type="checkbox"/>	President's Pride Report - September 30 deadline	Report of activities sponsored by Club or in which Club participates must be submitted to Optimist International by September 30.
	<input type="checkbox"/>	Conduct Club meeting	Make meetings fun, interesting and informative!

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<input type="checkbox"/>	Submit Club Roster Adjustments – September 30 deadline	<p>Club Roster Adjustment Forms to be counted for current year must be postmarked by official post office no later than September 30. Those with later postmark or received after September 30 will count in next administrative year. For email, fax or online (<a href="http://optimistleaders.org">optimistleaders.org</a>) the deadline is 11:59pm.</p>