



Club Officers Monthly Checklist

District 53

<https://d53tm.org/wp-content/uploads/D53-Club-Officers-Monthly-Checklist.pdf>

Forward

Club officers have the responsibility to lead their clubs to success. This is a joint effort between all seven officers (the Club Executive Committee or “EC”) and involves many tasks. In an effective EC, the various tasks are shared so that no single officer is excessively burdened. It’s also noteworthy that, although there are many tasks to perform to keep a club vibrant and successful, the tasks are spread out over the 12 months of your office term so that no one month is excessively busy. This Checklist document identifies the various tasks, suggests which officers typically have the primary responsibility for each, and in which months they are focused. Note that the officer task assignments are suggestive – clubs may redistribute responsibilities as best fits their club culture, operations, and member talent.

The document includes one page for each month and all officers’ duties are included on each month’s page.

This document has been approved and adopted by District 53 to share with all club officers.

You are elected! Here is how you set yourself and your club up for success.

Contents

Forward	1
June Checklist (Incoming Officers).....	2
July Checklist.....	3
August Checklist	4
September Checklist.....	5
October Checklist.....	6
November Checklist.....	7
December Checklist.....	8
January Checklist.....	9
February	10
March Checklist	11
April Checklist	12
May Checklist	13
June Checklist	14
Ongoing Tasks.....	15
Document Change Log	16

June Checklist (Incoming Officers)

All Officers	<ul style="list-style-type: none"> • Read the Club Leadership Handbook. • Initial discussion on club health and concerns. • Attend district-sponsored club officer training. (Deadline August 31. Four or more officers must be trained for DCP point 9,) • Attend joint EC meeting with incoming and outgoing officers to facilitate transition and information exchange. • Work with outgoing officer to understand role, responsibilities, and work in progress.
President	<ul style="list-style-type: none"> • Learn the club's strategy and process for EC meetings and club success planning. • Plan Officer Installation Ceremony coordinating with District leadership, Area or Division Director.
VP Education	<ul style="list-style-type: none"> • Learn club's strategy and process for managing club meetings, monitoring and managing member progress, and new member orientation and mentoring. • Gather education tracking materials from incoming VPE. • Discuss and train on the club's website, (usually Free Toast Host).
VP Membership	<ul style="list-style-type: none"> • Learn the club's strategy and process for managing membership prospect information. • Get access to the club's membership, prospects, former members, and DNC (do not contact) lists. • Discuss and train on the club's website, (usually Free Toast Host).
VP Public Relations	<ul style="list-style-type: none"> • Learn the club's strategy and process for public relations. • Check Toastmasters International "Find a Club" page for your club and make sure contact and meeting information is correct. (Important) Email address needs to direct to the VPE for Pathways approval requests and the VPM for "Find a Club" requests. • Discuss and train on the club's website, (usually Free Toast Host).
Secretary	<ul style="list-style-type: none"> • Learn the club's strategy and process for EC and club meeting minutes and any other club administrative duties. • Check Club Central/Club Management/Club Officer Assignment to ensure that incoming program year officers have been posted by predecessor,. (Deadline June 30, impacts DCP Point 10.) • Discuss and train on the club's website, (usually Free Toast Host).
Treasurer	<ul style="list-style-type: none"> • Learn the club's strategy and process for financial management, including new member and renewal dues management, materials procurement, and expense handling. • Discuss turning over checkbook and banking information. • Coordinate update of bank account signature cards. • Participate in audit with outgoing Treasurer and Audit Committee. • Read "Bookkeeping for Dummies."
SAA	<ul style="list-style-type: none"> • Learn club's strategy for meeting scheduling and managing club equipment and materials. • Locate and Gain access to all club equipment and materials. • Get information for club event location point of contact.

July Checklist	
All Officers	<ul style="list-style-type: none"> • Read the Club Leadership Handbook. (If not done already.) • Attend district-sponsored club officer training, if not attended in June. (Deadline August 31. Four or more officers must be trained for DCP point 9.) • Work with outgoing officer to understand role, responsibilities, and work in progress. • Attend initial Executive Committee meeting with each officer reporting on activities, accomplishments, and plans. • Review last year's Club Success Plan (CSP) results including the Distinguished Club Program (DCP) results for your club. • Establish the club's goals for the current year's Club Success Plan (CSP) and Distinguished Club Program (DCP).
President	<ul style="list-style-type: none"> • Complete Officer Installation Ceremony, coordinating with District leadership, Area or Division Director. • Plan and schedule Executive Committee Meetings for the program year. • Consulting with the rest of the EC, develop agenda for the first EC meeting. • Coordinate drafting the Club Success Plan (CSP). • Create audit committee. • Facilitate and work with VP Education to schedule a Moments of Truth Module for club. • Work with the Treasurer and EC to develop the Club Budget for the Year – identify what activities may require expenses (materials, venues, websites, equipment, etc.) • Review the Product Guide and budget and order any needed or desired educational materials. • Create Club Calendar, schedule out club meetings, open houses, club contests, and other special events. • Work with the VPM and VPPR to discuss a club open house possibly late Sept. • Designate club's proxy-holder for Annual Business Meeting conducted during International Convention in August. (ref: http://www.toastmasters.org/proxyquestions, Deadline August 11.) • President discusses the voting for the International Proxy with the executive team and reviews candidates and any proposals to be voted on. Determine club position, if any. The club may proxy their 2 votes to the District Director or another Toastmaster, and may direct their proxy how to vote, or leave it up to their proxy to decide. • Learn the chair's procedures from Robert's Rules of Order and read and reference the Club Constitution and Bylaws. • Check with your EC on the progress of their role transitions from their predecessors. Facilitate the transitions if necessary.
VP Education	<ul style="list-style-type: none"> • Meet with each member to discuss their educational goals and determine which award(s) they will achieve in the coming program year. Update the DCP plan accordingly. • Create or analyze and revamp if needed, the mentor program. • Grid out or update the Pathways Education program log for all current club members. • Monitor and encourage all club officers to attend district-sponsored club officer training.
VP Membership	<ul style="list-style-type: none"> • Report on the results of incentives and annual membership programs at the EC meeting, the club meeting, and in club newsletter and website. • With VPPR, Discuss the benefits of Toastmasters with Human Resources Department (Corporate clubs). • Create or update a media list and publicity kit with VPPR. • Review how to close a sale literature and how to do internal marketing (i.e. visitors to the clubs need to be convinced to return before they leave the building).
VP Public Relations	<ul style="list-style-type: none"> • Create OR update a media list and publicity kit with VPM. • Read about external marketing, writing press releases, and advertising. • Locate information for local Chamber of Commerce meetings.
Secretary	<ul style="list-style-type: none"> • Read about creating Noticed meetings and making agendas for EC meetings.
Treasurer	<ul style="list-style-type: none"> • Read "Bookkeeping for Dummies" (if not already done).
SAA	<ul style="list-style-type: none"> • Read about different arrangements of a room for different kinds of meetings. • Research which other rooms may be available for meetings in the event of a bounce.

August Checklist	
All Officers	<ul style="list-style-type: none"> • Read the Club Leadership Handbook (if not done already). • Attend district-sponsored club officer training if not done in June or July. (Deadline August 31. Four or more officers must be trained for DCP point 9.)
President	<ul style="list-style-type: none"> • Work with VP Education to schedule and facilitate a Moments of Truth Module for club. • If not done in July, designate club's proxy-holder for Annual Business Meeting conducted during International Convention in August. (ref: http://www.toastmasters.org/proxyquestions, Deadline August 11.)
VP Education	<ul style="list-style-type: none"> • No August specific tasks for VPE. Check August "All Officer" and VPE Ongoing tasks.
VP Membership	<ul style="list-style-type: none"> • Promote the Smedley Award membership campaign (Aug 1 – Sept 30) during meetings and in club newsletter and/or website.
VP Public Relations	<ul style="list-style-type: none"> • No August specific tasks for VPPR. Check August "All Officer" and VPPR Ongoing tasks.
Secretary	<ul style="list-style-type: none"> • No August specific tasks for Secretary. Check August "All Officer" and Secretary Ongoing tasks.
Treasurer	<ul style="list-style-type: none"> • Begin collecting member dues to meet October 1 deadline for renewals. Members can pay TI portion of dues on their own TI homepage, but club portion of dues must still be collected by Treasurer. (Deadline October 1, impacts DCP Point 10.)
SAA	<ul style="list-style-type: none"> • No August specific tasks for SAA. Check August "All Officer" and SAA Ongoing tasks.

September Checklist

All Officers	<ul style="list-style-type: none"> • No September specific tasks for All Officers. Check All Officers Ongoing tasks.
President	<ul style="list-style-type: none"> • Confirm that District submitted officer training reports to World Headquarters. Check Club Performance Report for number of officers trained and Club Officer Training report for officers credited. (Deadline for corrections October 31, impacts DCP point 9.) • Attend and vote at the Fall District Council Business Meeting (DCBM). Note: no proxies are allowed at the DC meeting but either the President or VPE can carry both club votes. (President and VPE are the designated club representatives at the District Council Business Meetings.)
VP Education	<ul style="list-style-type: none"> • Make checklist for upcoming Club Speech Contests and review contest schedule and materials on the District website. • Attend and vote at the Fall District Council Business Meeting (DCBM). Note: no proxies are allowed at the DC meeting but either the President or VPE can carry both club votes. (President and VPE are the designated club representatives at the District Council Business Meetings.)
VP Membership	<ul style="list-style-type: none"> • Continue promoting the Smedley Award membership campaign (ends Sept 30) during meetings and in club newsletter and/or website.
VP Public Relations	<ul style="list-style-type: none"> • No September specific tasks for VPPR. Check VPPR Ongoing tasks.
Secretary	<ul style="list-style-type: none"> • Learn the basics of Parliamentary Procedure (PP).
Treasurer	<ul style="list-style-type: none"> • Complete collecting member dues and submit membership payment to Toastmasters International Club Central before October 1 deadline for renewals. Members can pay TI portion of dues on their own TI homepage, but club portion of dues must still be collected by Treasurer. (Deadline October 1, impacts DCP Point 10.)
SAA	<ul style="list-style-type: none"> • No September specific tasks for SAA. Check SAA Ongoing tasks.

October Checklist	
All Officers	<ul style="list-style-type: none"> • No October specific tasks for All Officers. Check All Officers Ongoing tasks.
President	<ul style="list-style-type: none"> • Ensure your club's dues renewal (membership list with payment) is at World Headquarters by October 1. (Deadline October 1, impacts DCP Point 10.) • Confirm that district submitted officer training reports to World Headquarters. Check Club Performance Report for number of officers trained and Club Officer Training report for officers credited. (Deadline for corrections October 31, impacts DCP point 9.) • With VPE, Conduct Moments of Truth module.
VP Education	<ul style="list-style-type: none"> • With President, Conduct Moments of Truth module. • Plan and schedule club's Speech contest for December/January.
VP Membership	<ul style="list-style-type: none"> • Report on the results of the Smedley Award membership campaign during meetings and in club newsletter and/or website.
VP Public Relations	<ul style="list-style-type: none"> • No October specific tasks for VPPR. Check VPPR Ongoing tasks.
Secretary	<ul style="list-style-type: none"> • No October specific tasks for Secretary. Check VPPR Ongoing tasks.
Treasurer	<ul style="list-style-type: none"> • Ensure your club's dues renewal payments are posted to Club Central by October 1. • Inform President and EC of the bank account balance and update renewal status.
SAA	<ul style="list-style-type: none"> • No October specific tasks for SAA. Check SAA Ongoing tasks.

November Checklist	
All Officers	<ul style="list-style-type: none"> • No November specific tasks for All Officers.
President	<ul style="list-style-type: none"> • If your club elects officers, semiannually, ensure that elections are completed by the end of November. • With VPE, invite Area Director to visit the club if they haven't yet asked and assist him/her with completion of their report. (Deadline November 30.)
VP Education	<ul style="list-style-type: none"> • With President, invite Area Director to visit the club if they haven't yet asked and assist him/her with completion of their report. (Deadline November 30.)
VP Membership	<ul style="list-style-type: none"> • No November specific tasks for VPM. Check VPM Ongoing tasks.
VP Public Relations	<ul style="list-style-type: none"> • No November specific tasks for VPPR. Check VPPR Ongoing tasks.
Secretary	<ul style="list-style-type: none"> • If your club elects officers, semiannually, submit new officer list in Club Central/Club Management/Club Officer Assignment. (Deadline December 30, impacts DCP Point 10.)
Treasurer	<ul style="list-style-type: none"> • No November specific tasks for Treasurer. Check Treasurer Ongoing tasks.
SAA	<ul style="list-style-type: none"> • No November specific tasks for SAA. Check SAA Ongoing tasks.

December Checklist	
All Officers	<ul style="list-style-type: none"> • Attend district-sponsored club officer training, 2nd round. (Deadline February 28. Four or more officers must be trained for DCP point 9,) • If your club elects officers, semiannually, <ul style="list-style-type: none"> • Work with outgoing officer to understand role, responsibilities, and work in progress. • Initial discussion on club health and concerns.
President	<ul style="list-style-type: none"> • If your club elects officers, semiannually, <ul style="list-style-type: none"> • Plan Officer Installation Ceremony coordinating with District leadership, Area or Division Director.
VP Education	<ul style="list-style-type: none"> • Conduct club's International Speech and District-chosen contests. • Send club contest winners names to Area Director as contestants in February/March area contest.
VP Membership	<ul style="list-style-type: none"> • No December specific tasks for VPM. Check VPM Ongoing and All Officer tasks.
VP Public Relations	<ul style="list-style-type: none"> • No December specific tasks for VPPR. Check VPPR Ongoing and All Officer tasks.
Secretary	<ul style="list-style-type: none"> • If your club elects officers, semiannually, submit new officer list in Club Central/Club Management/Club Officer Assignment. (Deadline December 30, impacts DCP Point 10.)
Treasurer	<ul style="list-style-type: none"> • No December specific tasks for Treasurer. Check Treasurer Ongoing and All Officer tasks
SAA	<ul style="list-style-type: none"> • No December specific tasks for SAA. Check SAA Ongoing and All Officer tasks.

January Checklist	
All Officers	<ul style="list-style-type: none"> • Attend district-sponsored club officer training, 2nd round, if not attended in December. (Deadline February 28. Four or more officers must be trained for DCP point 9,) • Start thinking about who can replace you for the next program year. • EC complete mid-term review of Club Success Plan (CSP) and Distinguished Club Program (DCP) Review. Make any needed mid-course adjustments. • Encourage all members to consider attending the District 53 winter event. • Review Club Leadership Handbook – see if there is anything more that can be done for the club. • Promote attendance at District Spring Conference (typically scheduled in May). • If your club elects officers, semiannually, <ul style="list-style-type: none"> • Read the Club Leadership Handbook. • Discuss club health and concerns. • Work with outgoing officer to understand role, responsibilities, and work in progress.
President	<ul style="list-style-type: none"> • If your club elects officers, semiannually, complete Officer Installation Ceremony, coordinating with District leadership, Area or Division Director. • Review the Product Guide and budget and order any needed or desired educational materials.
VP Education	<ul style="list-style-type: none"> • Meet with each member to discuss his or her educational goals and determine which award(s) he/she will achieve by the end of the program year. • Conduct club's International Speech and District-chosen contests. • Send club contest winners names to Area Director as contestants in February/March area contest.
VP Membership	<ul style="list-style-type: none"> • Promote TI's membership programs, including Talk Up Toastmasters! (Feb 1 – Mar 31), during meetings and in club newsletter/website. • Update a media list and publicity kit with VPPR.
VP Public Relations	<ul style="list-style-type: none"> • Update a media list and publicity kit with VPM.
Secretary	<ul style="list-style-type: none"> • Re-read the club constitution and governing documents.
Treasurer	<ul style="list-style-type: none"> • No January specific tasks for Treasurer. Check Treasurer Ongoing and All Officer tasks.
SAA	<ul style="list-style-type: none"> • No January specific tasks for SAA. Check SAA Ongoing and All Officer tasks.

February	
All Officers	<ul style="list-style-type: none"> • Attend district-sponsored club officer training, 2nd round, if not attended in December or January. (Deadline February 28. Four or more officers must be trained for DCP point 9,) • Start thinking about who can replace you for the next program year. • Encourage all members to consider attending the District 53 winter event. • Promote attendance at District Spring Conference (typically scheduled in May).
President	<ul style="list-style-type: none"> • Promote Area Speech Contest and encourage all members to attend in support of club's contestants, to fill roles, and for the entertainment and educational value. • Review October's Moments of Truth and benchmark any progress
VP Education	<ul style="list-style-type: none"> • No February specific tasks for VPE. Check VPE Ongoing and All Officer tasks.
VP Membership	<ul style="list-style-type: none"> • Promote the Talk Up Toastmasters membership campaign (Feb 1 – Mar 31) during meetings and in club newsletter/website.
VP Public Relations	<ul style="list-style-type: none"> • No February specific tasks for VPPR. Check VPPR Ongoing and All Officer tasks.
Secretary	<ul style="list-style-type: none"> • No February specific tasks for Secretary. Check Secretary Ongoing and All Officer tasks.
Treasurer	<ul style="list-style-type: none"> • Begin collecting member dues to meet April 1 deadline for renewals. Members can pay TI portion of dues on their own TI homepage, but club portion of dues must still be collected by Treasurer. (Deadline October 1, impacts DCP Point 10.)
SAA	<ul style="list-style-type: none"> • No February specific tasks for SAA. Check SAA Ongoing and All Officer tasks.

March Checklist	•
All Officers	<ul style="list-style-type: none"> • Promote Area/Division Speech Contest and encourage all members to attend in support of club's contestants, to fill roles, and for the entertainment and educational value. • Promote attendance at District Spring Conference (typically scheduled in May).
President	<ul style="list-style-type: none"> • Confirm that District submitted officer training reports to World Headquarters. Check Club Performance Report for number of officers trained and Club Officer Training report for officers credited. (Deadline for corrections May 30, impacts DCP point 9.) • Appoint the Nominating Committee to nominate club officers for the next program year. Nominations should be completed by April 30 so that the election can be done by mid-May. Chair is typically the Immediate Past President.
VP Education	• No March specific tasks for VPE. Check VPE Ongoing and All Officer tasks.
VP Membership	• Continue promoting the Talk Up Toastmasters! membership campaign (ends March 31) during meetings and in club newsletter/website.
VP Public Relations	• No March specific tasks for VPPR. Check VPPR Ongoing and All Officer tasks.
Secretary	• No March specific tasks for Secretary. Check Secretary Ongoing and All Officer tasks.
Treasurer	• Complete collecting member dues and submit membership payment to Toastmasters International Club Central before April 1 deadline for renewals. Members can pay TI portion of dues on their own TI homepage, but club portion of dues must still be collected by Treasurer. (Deadline October 1, impacts DCP Point 10.)
SAA	• No March specific tasks for SAA. Check SAA Ongoing and All Officer tasks.

April Checklist	
All Officers	<ul style="list-style-type: none"> • Promote Division/District Speech Contest and encourage all members to attend in support of local contestants, to fill roles, and for the entertainment and educational value. • Promote attendance at District Spring Conference (typically scheduled in May).
President	<ul style="list-style-type: none"> • Announce Nominating Committee's candidate list for next program year during business segment of club's meeting. • Attend and vote at the Spring District Council Business Meeting (DCBM), held in April or May. Note: no proxies are allowed at the DC meeting but either the President or VPE can carry both club votes. (President and VPE are the designated club representatives at the District Council Business Meetings.)
VP Education	<ul style="list-style-type: none"> • Review DCP status especially regarding member awards and encourage those who are close to complete path levels by June 30. • Attend and vote at the Spring District Council Business Meeting (DCBM), held in April or May. Note: no proxies are allowed at the DC meeting but either the President or VPE can carry both club votes. (President and VPE are the designated club representatives at the District Council Business Meetings.)
VP Membership	<ul style="list-style-type: none"> • Report on the results of the Talk Up Toastmasters! membership campaign during meetings and in club newsletter/website. • Begin promoting Beat the Clock membership campaign which runs from May 1st through June 30th.
VP Public Relations	<ul style="list-style-type: none"> • No April specific tasks for VPPR. Check VPPR Ongoing and All Officer tasks.
Secretary	<ul style="list-style-type: none"> • No April specific tasks for Secretary. Check Secretary Ongoing and All Officer tasks.
Treasurer	<ul style="list-style-type: none"> • Ensure your club's dues renewal payments are posted to Club Central by April 1. • Inform President and EC of the bank account balance and update renewal status.
SAA	<ul style="list-style-type: none"> • No April specific tasks for SAA. Check SAA Ongoing and All Officer tasks.

May Checklist	
All Officers	<ul style="list-style-type: none"> • Promote District Speech Contest and encourage all members to attend in support of local contestants, to fill roles, and for the entertainment and educational value. • Promote attendance at District Spring Conference (typically scheduled in May).
President	<ul style="list-style-type: none"> • Attend and vote at the Spring District Council Business Meeting (DCBM), held in April or May. Note: no proxies are allowed at the DC meeting but either the President or VPE can carry both club votes. (President and VPE are the designated club representatives at the District Council Business Meetings.) • Conduct club officer elections. • With VPE, invite Area Director to visit the club if they haven't yet asked and assist him/her with completion of their report. (Deadline May 31.)
VP Education	<ul style="list-style-type: none"> • Attend and vote at the Spring District Council Business Meeting (DCBM), held in April or May. Note: no proxies are allowed at the DC meeting but either the President or VPE can carry both club votes. (President and VPE are the designated club representatives at the District Council Business Meetings.) • Review DCP status especially regarding member awards and encourage those who are close to complete path levels by June 30. • With President, invite Area Director to visit the club if they haven't yet asked and assist him/her with completion of their report. (Deadline May 31.)
VP Membership	<ul style="list-style-type: none"> • Promote the Beat the Clock membership campaign (May 1 – Jun 30) during meetings and in club newsletter/website.
VP Public Relations	<ul style="list-style-type: none"> • Publicize officer election results at meetings, in newsletter, on website, and in local media.
Secretary	<ul style="list-style-type: none"> • Submit new club officer list in Club Central before the June 30 deadline (if elections are finished). Strive to complete this by mid-May.
Treasurer	<ul style="list-style-type: none"> • No May specific tasks for Treasurer. Check Treasurer Ongoing and All Officer tasks.
SAA	<ul style="list-style-type: none"> • No May specific tasks for SAA. Check SAA Ongoing and All Officer tasks.

June Checklist	
All Officers	<ul style="list-style-type: none"> • Gather information, consolidate documents and files, document task status, in prep for transition to your successor. • Attend joint EC meeting with incoming and outgoing officers to facilitate transition and information exchange. • Meet with your successor to successfully transition your officer role to him/her, with special emphasis on club-defined strategies and processes and work in progress. May take several meetings over several weeks and may even extend into the next program year. • If going to be an officer in the next program year, attend district-sponsored club officer training. (Deadline August 31. Four or more officers must be trained for DCP point 9.) • Don't consider your role to be complete until your successor is confident in carrying the role forward.
President	<ul style="list-style-type: none"> • Train successor on the club's strategy and process for EC meetings and club success planning. • Schedule and conduct joint EC meeting with incoming and outgoing officers to facilitate transition and information exchange. Include Club Success Plan (CSP) and Distinguished Club Program (DCP) performance from previous year. • Invite incoming Area Director to install newly elected officers in July, and schedule the Induction Ceremony for a July club meeting.
VP Education	<ul style="list-style-type: none"> • Train successor on the club's strategy and process for managing club meetings, monitoring and managing member progress, and new member orientation and mentoring. • Ensure that all educational completions have been posted at Club Central. • Gather education tracking materials for incoming VPE.
VP Membership	<ul style="list-style-type: none"> • Train successor on the club's strategy and process for managing membership prospect information. • Gather membership, prospects, alumni, and do-not-contact lists for transition to your successor.
VP Public Relations	<ul style="list-style-type: none"> • Train successor on the the club's strategy and process for public relations. • Document the status of any PR campaigns for transition to your successor.
Secretary	<ul style="list-style-type: none"> • Train successor on the club's strategy and process for EC and club meeting minutes and any other club administrative duties. • Ensure that meeting minutes and any other club documentation is well organized for transition to your successor. • File any outstanding meeting minutes.
Treasurer	<ul style="list-style-type: none"> • Train successor on the club's strategy and process for financial management, including new member and renewal dues management, materials procurement, and expense handling. • Ensure that all new member applications have been posted at Club Central. • Facilitate the transition of the bank account to your successor and 2nd signatory, if any.
SAA	<ul style="list-style-type: none"> • Train successor on the club's strategy for meeting scheduling and managing club equipment and materials. • In preparation to transfer to successor: <ul style="list-style-type: none"> • Re-gather information for event location point of contact. • Research which other room availability for meetings in the event of a bounce. • Consolidate all club equipment and materials

Ongoing Tasks	These tasks must be done as they come up throughout the program year.
All Officers	<ul style="list-style-type: none"> • At each EC meeting: <ul style="list-style-type: none"> • Discuss club health and concerns. • Review Club Success Plan (CSP) and Distinguished Club Program (DCP) progress. • Each officer reports on activities, accomplishments, and plans. • Collaborate on club newsletter (if used).
President	<ul style="list-style-type: none"> • Facilitate and oversee development, monthly review, and refinement of the Club Success Plan (CSP), including Distinguished Club Program (DCP) efforts, goals, and performance. • Coordinate with VP Education at club meetings for any award recognition. • Coordinate with VP Membership welcoming new members and new member induction. • Working with the Treasurer and rest of the EC, oversee Club Budget for the program year. • Attend Area Council Meeting when scheduled by the Area Director.
VP Education	<ul style="list-style-type: none"> • Ensure each club meeting has an agenda with roles filled. Check or add Club meeting agendas onto club website. Add and update roles and descriptions as needed. • Assign mentors to new members and, if possible, provide an orientation for new members, collaborating with VPM. • Periodically check on mentors/mentees status to ensure effective mentoring. • Ask members to fulfill specific meeting roles to meet their goals and earn their path levels at a reasonable pace. • Maintain the club's Pathways Education program log (track member progress). • Approve Pathways path completion requests. • Coordinate with President at club meetings for any award recognition. • Schedule education sessions selected from The Better Speaker Series (Item 269), The Successful Club Series (Item 289) and The Leadership Excellence Series (Item 310), to be delivered by you or other experienced Toastmasters working on appropriate Pathways projects from the Pathways education program. • Attend Area Council Meeting when scheduled by the Area Director.
VP Membership	<ul style="list-style-type: none"> • Collaborate with VPE on new member orientation and onboarding. • Create and keep a stock of New Member Packets and Guest Packets with VPPR. • Promote TI's membership programs, including the Smedley Award (Aug 1 – Sept 30), during meetings and in club newsletter and website. • Work with VPPR to promote club in the club community. • Coordinate with President welcoming new members and new member induction. • Communicate with prospective members, previous guests, and new members regarding upcoming meetings and/or events. • Work with Treasurer to ensure new member applications are posted in a timely manner.
VP Public Relations	<ul style="list-style-type: none"> • Create and/or maintain a regular presence on Meetup (with District PRM) and/or at least two social networking sites. Update at least bi-weekly. • Create and keep a stock of New Membership Packets and Guest Packets with VPM. • Keep club website up to date with meeting information. • Distribute literature and Toastmasters Magazines (internally for Corporate, to the area for community clubs)
Secretary	<ul style="list-style-type: none"> • Create and file EC Meeting Minutes, and club meeting minutes, if any.
Treasurer	<ul style="list-style-type: none"> • Track all club revenue and expenses and ensure alignment with budget. • Work with VPM to ensure new member applications are posted in a timely manner.
SAA	<ul style="list-style-type: none"> • Ensure meeting rooms (or Zoom) are set up as appropriate for all meetings. set up the room in different ways for different events.

Document Change Log

Date	Description of Changes	Changed By	Approved by*
Unknown	Original Draft	D4 TM & D53 TM (Heather Turner & Andrew Watt)	
03/22/23	Refreshed for 2023 as part of DTM Project.	Sarita Patel	
06/12/23	End to end revamp, resolved errors, omissions, & inconsistencies. Converted to MS Word for subsequent maintenance. Reformatted and applied D53 documentation standards. Re-ordered roles by TM standard hierarchy. Added "All Officers" row to each month and final page for "Ongoing Tasks" to reduce redundancy. Added title page banner, Forward, Table of Contents, and Change Log.	Norm Thibodeau, DAM	Patti Walter, DD
07/20/23	Fixed a minor typo on Page 1.	Norm Thibodeau, DAM	Patti Walter, DD
11/12/24	Fixed footers which were not showing on pages 1:2. Removed text about posting member awards in Club Central, since new Pathways LMS now handles that automatically. Mirrored May DCBM items to April, since the DCBMs may occur in either month. June (incoming), added key learning tasks. July, added task to draft the CSP for President. July & August, refined ABM proxy info for President. January, moved CSP review from President & VPE to All officers. January & February, changed "District JanJam (or FebFest) event" to "District 53 winter event." April & May, clarified DCBM language for President & VPE. June, added key succession tasks. Ongoing Tasks, minor refinements. Deleted year (2023-2024) from title since this doc is not program-year specific. Added the WordPress Media Folder link to the top.	Norm Thibodeau, DSM	Bettyann Peck, DD, 11-12-24

* Per D53 Documentation Standard, approval of any changes is required by the District Director, with review by the District Trio.