

CLUB GOVERNANCE CHECKLIST

Every Rotary club board has 'governance' obligations which need to be observed, so to facilitate ensuring your club is compliant and properly operational, use the checklist below.

ITEM	DETAIL	DONE
Accounts and Finance	☀️ Ensure your club has two separate accounts to handle your finances – one administration account and one fund raising account.	<input type="checkbox"/>
	☀️ Have multiple members authorized to access the club's bank accounts.	<input type="checkbox"/>
	☀️ Have accounts set for at least two authorized members to confirm expenditure.	<input type="checkbox"/>
	☀️ Make sure you provide an annual financial report for your club (audited only if your members request them to be) at your annual general meeting.	<input type="checkbox"/>
	☀️ File federal and state documents as required.	<input type="checkbox"/>
Budgets	☀️ As part of your club annual planning, set budgets for expected income and expenditures.	<input type="checkbox"/>
	☀️ Have at least one member aware of available grant funding and how to apply for various local and international grants. Complete mandatory trainings.	<input type="checkbox"/>
Insurances	☀️ Check to make sure you have all appropriate (Rotary or club) insurance coverage for your club and its activities.	<input type="checkbox"/>
	☀️ Have Certificates of Insurance for your policies and the policies of any contractors.	<input type="checkbox"/>
Legal Compliance	☀️ Ensure your club is incorporated and registered with the state.	<input type="checkbox"/>
	☀️ Ensure you have a current Constitution and By Laws	<input type="checkbox"/>
	☀️ Ensure you have in place all policies and procedures required by law – Anti-Bullying and Harassment, Privacy, Anti-Discrimination, Diversity, Equity and Inclusion, Safe Volunteering, etc.	<input type="checkbox"/>
	☀️ Review your policies at least every 4 years.	<input type="checkbox"/>
	☀️ If you plan to raise money through a raffle, make sure the raffle complies with state regulations.	<input type="checkbox"/>
	☀️ Hold your Annual General Meeting within six (6) months of the end of the financial year	<input type="checkbox"/>
Membership	☀️ Aim to retain all existing members.	<input type="checkbox"/>
	☀️ Work to add members to your club each year with a sensible growth percentage.	<input type="checkbox"/>
	☀️ Involve new members in activities or projects as soon as possible to ensure their engagement.	<input type="checkbox"/>
	☀️ Work with the community to generate a pipeline of potential members through sponsoring Interact, Rotaract.	<input type="checkbox"/>

