



## Executive End of Term Checklist

### EXECUTIVE COMMITTEE

- Slate of Officers is complete and voted on by the general membership.
- Establish meeting date for official transfer of information to new executive.
- Executive Manual for each executive position has been updated/ revised
  - Content suggestions—Executive contact information, meeting dates, Constitution/By-laws, responsibilities for position, communications: newsletter, calendar, financial policies, sample forms, Insurance certificate, quick facts sheet, Executive package given out at Ontario Council AGM.
- Club AGM executive reports are complete and published/shared with general membership.
- Executive meeting dates and location have been confirmed in cooperation with the new President.
- Required names and contact information have been submitted to National Membership website and your RD.
  - **Club Membership:** <http://www.cfuwmembership.org> (Check here for further data entry instruction)
  - This site allows you to update club executive information, record the number and type of club members, and allows you to be able to print out your invoice membership dues. The Directory is also on the site under the “View Only” tab. The site requires a club username and password. If you do not know or remember yours, please email Member Services [membershipservices@cfuw.org](mailto:membershipservices@cfuw.org) at National Office.
- Names and contact information may be sent to other sources i.e. universities, colleges, M.P., M.P.P. etc.

### FINANCIAL CONSIDERATIONS

- A financial review for the current year has been completed.
- A budget for the coming year has been passed at the club's AGM. The budget includes funds for attendance at:
  - A Fall Gathering
  - 3 Ontario Council Speaker Series/Workshops
  - Ontario Council AGM
  - National AGM
- Bank signing authority has been updated with at least 2-3 people to sign.
- Membership fee and registration deadline has been communicated to the general membership.
- Discussions have been held with the scholarship fund Board concerning a fundraising plan to support scholarships.

## **GENERAL MEETING PROGRAM**

- General Meeting location and dates have been confirmed.
- Speakers have been confirmed.
- A club brochure and registration form have been created.
- The club brochure has been printed and distributed.
- The website has been updated.
- Privacy concerns regarding web information have been addressed.

## **GENERAL ITEMS:**

**If possible, and if this information is available that it is transferred to the new Executive.**

- A plan exists to attract new members.
- A membership retention plan is in place.
- There is a strategy for club promotion within the community.
- Advocacy initiatives have been identified for consideration.
- Calendar for the upcoming year has been reviewed and known events included.