



Club President's Monthly Checklist

This checklist is designed to help Rotary club presidents-elect and presidents plan and monitor club activities on a monthly basis. It also serves as a monthly reminder of activities and deadlines that apply to all Rotary clubs.

Read the entire checklist to gain an overall perspective of the next 18 months. You may wish to place a check (✓) in each box after the item has been addressed to your satisfaction. An asterisk (*) indicates a Rotary Foundation-related item. Please contact The Rotary Foundation of Rotary International for more details at: <http://www.rotary.org/foundation/index.html>

The Rotary events listed below do not have fixed dates. Write the dates that your club will attend the events on the lines below and then add them to the appropriate month on the blank lines provided. You can also use the blank lines in each month to add local events that are specific to your club.

District conference _____

District leadership seminar _____

District membership seminar _____

District Rotary Foundation seminar _____

Leadership development program _____

Official visit of district governor _____

Assistant governor visits _____

Club assemblies _____

Installation of club officers _____

Visit www.rotary.org, for details on programs listed or contact your Club and District Support representative with questions at: <http://www.rotary.org/support/index.html>.

As Club President-elect

January - Rotary Awareness Month

- Begin developing goals and appointing committee chairs.
- Begin preparing for next year's club budget and reviewing the status of continuing club projects.
- Register for presidents-elect training seminar (PETS)
- Encourage all incoming club officers and new members to attend the district assembly.
- Check with District Rotary Foundation Chair to determine the availability of DDF to support Ambassadorial Scholarships/Rotary Grants for University Teachers*
- Check with the District Scholarships Subcommittee Chair to determine the district deadline to submit Educational Programs applications.*
- Educate the club about the Ambassadorial Scholarships/Rotary Grants for University Teachers, and Rotary World Peace Fellowships programs and promote them in your community. *
- Identify and recruit a public relations (PR) chairperson and committee for the club.
- _____
- _____
- _____

February - World Understanding Month

- Hold the first meeting of the board-elect.
- Register for presidents-elect training seminar (PETS).
- Encourage all incoming club officers and new members to attend the district assembly.
- Encourage PR training for the public relations committee or encourage self-training by reviewing the Public Relations section of the Rotary Web site,

registering for Rotary PR Tips, e-newsletter, and ordering PR training materials.

- Confirm that the club president has received *Humanity in Motion* public service announcement (PSA) materials.

March - Literacy Month

- Attend PETS on _____ March.

- Set the club's annual giving goal to The Rotary Foundation, taking into account the "*Every Rotarian Every Year*" campaign*.

- Using the RI Presidential Citation as a guide, develop a well rounded plan for the year incorporating projects and activities that reflect RI President-elect's emphases for the coming year.

- Register to use Member Access and ensure incoming Club Secretary has also registered

- Contact Governor-elect to confirm Group Study Exchange (GSE) pairing for the coming year. Begin promoting GSE program within the club and encourage Rotarians to recruit potential GSE team member candidates and/or consider applying for the position of GSE team leader*.

- Encourage the PR committee to develop a PR plan for the next Rotary year. Review the publication *Effective Public Relations* (#257) for more information

- Work with the current club president to ensure PR Award and Best Cooperative Projects Award applications have been submitted to the district governor.

April - Magazine Month

- Attend the district assembly with other incoming club officers on _____ April or May.
- Submit your Fund Development Club Goal Report form to your District Governor-elect by 1 May*
- Ask the PR chair to finalize the PR plan for the club, and identify key local media contacts.
- _____
- _____
- _____

May

- Review the status of current club projects and how they will affect planning for the upcoming year.
- Review the status of current Humanitarian Grants and ensure progress/final reports have been submitted*.
- Hold club assembly to discuss plans made at district assembly and upcoming RI theme. Discuss goals set for giving to The Rotary Foundation.
- Confer with the secretary and incoming secretary to update the RI membership database via the web, www.rotary.org / member access, on or before 1 June, so that the July semiannual report (SAR) from Rotary International will be up-to-date and accurate.
- Ask the PR chair to develop a list of prospective media contacts and an outreach calendar based on the PR plan.
- Ask the PR chair to order PR promotional materials including *This is Rotary* (#001) and *What's Rotary* (#419)
- _____
- _____
- _____

June - Rotary Fellowships Month

- Consult with the secretary and incoming secretary to update the RI membership database via the web, www.rotary.org / member access, on or

before 1 June, so that the July semiannual report (SAR) from Rotary International will be up-to-date and accurate.

- Finalize the Planning Guide for Effective Rotary Clubs and submit it to the district governor-elect or assistant governor before 1 July.
- Finalize the club budget for the coming year.
- Finalize Rotary Foundation contribution goals for the coming year*.
- Confer with the outgoing president to ensure a smooth transition.
- Arrange for a joint meeting of the incoming and outgoing club boards to ensure continuity.
- Ask the PR chair to promote new club officers to local media contacts
- _____

As Club President

July

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Initiate membership development programs for the year.
- Review current RI sponsored membership development certificate programs.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Plan and conduct a club assembly to discuss and adopt the year's program. Affirm goals set for the club's participation in Rotary Foundation programs*.
- Ensure that the semiannual report (SAR) has been received by the club secretary. Work with the secretary to complete the SAR and send with dues to RI. Submit district per capita dues, if applicable. A past-due reminder notice will be sent on 1 October if RI dues have not yet been paid.
- Endorse the nomination of a club member for the Four Avenues of Service Citation for Individual Rotarians, between 1 July and 30 June. Inform the governor. Contact the RI Programs staff for details at programs@Rotary.org.
- Request club Foundation committee and district alumni subcommittee chair to identify outstanding nominee for The Rotary Foundation Global Alumni Service to Humanity Award. *
- Submit applications for Matching Grants and proposals for 3-H Grants. *
- Update classification roster. Prepare current list of filled and unfilled classifications.
- Contact the District GSE Chair to confirm deadlines for submitting GSE team member/leader applications for district GSE selections. Recruit young professionals between the ages of 25-40 and encourage qualified candidates to submit a GSE Team Member Application. *
- Rotary World Peace Fellowships: applications due to The Rotary Foundation from districts by 1 July*.
- Ask the PR chair to promote the club as planned

August - Membership and Extension Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Conduct club activities to support membership development and extension efforts.
- Promote attendance at the district membership seminar.
- Promote attendance at the district Rotary Foundation seminar*
- Induct appropriate Scholar and Group Study Exchange team member alumni.*
- Consider nominating a club member for one of these service awards from The Rotary Foundation: District Service Award, Citation for Meritorious Service, or Distinguished Service Award. *
- 1 August – Deadline for submitting Competitive Matching Grant Applications for consideration at the October Trustee Meeting*
- Ask the PR chair to promote club as planned – including any literacy projects for 8 September, International Literacy Day.
- _____
- _____
- _____

September - New Generations Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Conduct youth-related activities and programs and celebrate club success in Interact, Rotaract, RYLA and Youth Exchange programs.
- Monitor membership development initiatives and goals.
- Endorse qualified GSE team members' applications and submit them to the district GSE selection committee by their deadline for consideration. *
- Ask the PR chair to promote club as planned – including any polio efforts for 24 October, World Polio Day.
- _____
- _____
- _____

October - Vocational Service Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Conduct vocation-related activities and programs.
- Monitor membership development initiatives and goals.
- Ambassadorial Scholarships and Rotary Grants for University Teachers: applications due to The Rotary Foundation from districts by 1 October. *

- Based on the club's contributions to The Rotary Foundation, submit a timely request for Paul Harris Fellow recognition items, for presentation at a club ceremony during November, "Rotary Foundation" Month. *
- Ask the PR chair to promote club as planned – including any service projects that might be highlighted by local media during the upcoming holidays
- _____
- _____
- _____

November - Rotary Foundation Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Consult with the secretary to update the RI membership database via the web, www.rotary.org / member access, on or before 1 December, so that the January semiannual report (SAR) from Rotary International will be up-to-date and accurate.

- Conduct related activities and programs on Rotary Foundation programs, including PolioPlus, and fund development*. (e.g. Paul Harris Fellows, Benefactors, Bequest Society members and major donors).
- Week including 5 November is World Interact Week. Support your local Interact club or help organize one.
- Monitor membership development initiatives and goals.
- 15 November: Deadline to submit nominations for The Rotary Foundation Distinguished Service Award. *
- 15 November (US clubs only): Deadline to submit IRS Form 990 (and possibly form 990-T) to U.S. Internal Revenue Service. Contact the IRS for report forms, filing limits, and other requirements (www.irs.ustreas.gov).
- Request club assistance in hosting the visiting Group Study Exchange (GSE) teams in the district. Forward contact information of interested Rotarian hosts to the district GSE Chair. *
- Inform district GSE Chair of your club's interest in having an inbound or outbound GSE team make a presentation at your club. *
- Nominations for The Rotary Foundation Global Alumni Service to Humanity Award must be sent to your zone's regional Rotary Foundation coordinator by 31 December *.
- Ask the PR chair to promote club as planned – including any health or educational projects related to 1 December, World AIDS Day.
- _____
- _____
- _____

December - Family Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Consult with the secretary to update the RI membership database via the web, www.rotary.org / member access, on or before 1 December, so that the January semiannual report (SAR) from Rotary International will be up-to-date and accurate.
- Assess the progress of club projects and provide progress reports for Humanitarian Grants as required by the Foundation.
- Conduct activities to demonstrate your club's commitment to family and community.
- Hold annual club election no later than 31 December.
- Monitor membership development initiatives and goals.
- 15 December – New deadline for submitting Competitive Matching Grant Applications for consideration at the April Trustee Meeting*
- Ensure that all contributions to be counted within the calendar year are received at The Rotary Foundation before 31 December*.
- Ask the PR chair to promote club as planned – including any family or service projects related to the holidays.
- _____
- _____
- _____

January - Rotary Awareness Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Conduct activities and programs to provide members with continuing education on RI and to publicize Rotary to the community.
- Plan to send club representatives to the district conference and to the RI Convention.
- Verify with the club secretary that the January semiannual report (SAR) has been received. Work with the club secretary to complete the SAR and send with dues to RI. Submit district per capita dues, if applicable. A past-due reminder notice will be sent on 1 April if RI dues have not yet been paid.
- Monitor membership development initiatives and goals.
- Conduct a semiannual checkup on all committee activities and objectives.
- Plan and conduct club assembly to review progress toward all club goals.
- Promote availability of Ambassadorial Scholarships and Rotary Grants for University Teachers locally. Check with district scholarships chair on deadline for clubs to submit applications for the district-level competition. *
- Promote availability of world-competitive Rotary World Peace Fellowships. Check with district Rotary World Peace Fellowships chair on deadline for clubs to submit applications for the district-level competition. *
- 31 January: Deadline for reporting next year's club president and secretary to RI for the Official Directory (007-EN), and to the district governor-elect.
- Ask the PR chair to promote club as planned – including Rotary's anniversary on 223 February
- Follow-up with the district governor to confirm any celebration plans district wide.
- _____

- _____
- _____

February - World Understanding Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Conduct club activities to promote world understanding and peace.
- 23 February (Rotary's anniversary) is World Understanding and Peace Day. Conduct activities that emphasize Rotary's commitment to international understanding, friendship, and peace.
- Monitor membership development initiatives and goals.
- Ask the PR chair to promote club as planned – including water and environmental projects for 22 March, World Water Day.
- Promote attendance at the RI Convention.
- _____
- _____
- _____

March - Literacy Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Conduct literacy related activities and programs.

- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Week including 13 March is World Rotaract Week. Conduct activities in support of your local Rotaract club or help organize one.
- Monitor membership development initiatives and goals.
- 15 March: Deadline for governors to submit one club nomination for RI's Significant Achievement Award. Contact the district governor for details.
- 15 March: Deadline to submit RI Best Cooperative Projects Award and PR Award applications to the district governor
- 31 March: Last day to submit a Matching Grant application for funding consideration in the current Rotary year. *
- 31 March: Last day to submit a 3-H Grant proposal for funding consideration in the following Rotary year. *
- If GSE team member sponsored by club was selected for outbound GSE team, invite the candidate to Rotary club meetings as part of orientation and to speak at club*.
- Ask the PR chair to promote club as planned – including environmental or sustainable development projects for 22 April, Earth Day.
- Encourage PR training for incoming PR committee or ask current PR chair to train them, introducing RI resources such as Effective Public Relations (#257), the RI Web site and PR Tips e-newsletter, to the committee.
- _____
- _____
- _____

April - Magazine Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Conduct a club program on THE ROTARIAN or a Rotary regional magazine.
- Consider a nominee for The Rotary Foundation Citation for Meritorious Service; nominations received after 15 May will be returned to the nominator. Contact your district governor for details. *
- Monitor membership development initiatives and goals.
- 1 April: Deadline for clubs to submit detailed explanation of their membership development strategy, initiative, or program to their district governor for consideration of a Membership Development Initiative (MDI) award.
- 15 April: Deadline for governors to submit Presidential Citation certification forms for clubs to RI. Advise the district governor if the club has met the qualifications for the Presidential Citation according to the schedule determined by the district governor.
- 15 April: Deadline for RI PR Award applications to the district governor
- Ask the PR chair to share PR plan with incoming committee, including media contact list; offer ongoing training as needed.
- _____
- _____
- _____

May

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Monitor membership development initiatives and goals.
- Review the status of current Humanitarian Grants and ensure progress/final reports have been submitted*.
- 15 May: Deadline for governors to submit one club nomination for the RI Public Relations Award. Contact the district governor for details.
- 15 May: Deadline to submit nominations for The Rotary Foundation Citation for Meritorious Service. *
- Invite returning GSE team members to speak at club about their recent GSE experience. Invite qualified GSE alumni to consider membership in your club*.
- Ask the PR chair to promote club as planned – including any local or global community service projects
- _____
- _____
- _____

June - Rotary Fellowships Month

- Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.
- Submit final Rotary year contributions to The Rotary Foundation before 30 June*.

- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- Promote club members' participation in Rotary Fellowships.
- Send club representatives to the RI Convention.
- Prepare a year-end audit of the club's financial transactions, working with club secretary and treasurer. Submit a financial statement to the club about its fiscal status.
- Prepare a final report to the club on its Rotary Foundation goal achievements and program participation*.
- Monitor membership development initiatives and goals. Provide the club with a final report on membership growth and identify areas requiring continued action.
- Confer with the president-elect to ensure a smooth transition.
- Assess all Humanitarian Grants activity and provide progress or final reports to The Rotary Foundation for all open grant projects. *
- If club sponsored a GSE team member candidate, ensure that the candidate has submitted a final report to the GSE district chair. Continue to involve GSE alumni in club activities*.
- Rotary World Peace Fellowships: applications due to The Rotary Foundation from districts by 1 July*.
- Rotary Peace and Conflict Studies Program: applications for the January-April session due to The Rotary Foundation from districts by 1 July*.
- Plan a dignified ceremony for the installation of next year's club officers.
- Highlight any media coverage received and thank the PR committee for their outreach efforts.
- _____
- _____
- _____