



The Club President's Monthly Checklist



The following checklist is for Rotary club presidents-elect and presidents to use as a tool for planning and monitoring club activities on a monthly basis. While there may be additional local activities, this checklist serves as a monthly reminder of basic activities and deadlines that apply to all Rotary clubs.

It is recommended that you 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. A * symbol indicates a Rotary Foundation-related item. Please contact The Rotary Foundation of Rotary International for further details.

There are several events during the Rotary year that do not have fixed dates. Write the dates of these events below and then add them to the appropriate month using the blank lines provided. Also use these spaces to include local activities not included in this checklist:

- District Rotary Foundation seminar _____
- District conference _____
- District leadership seminar _____
- District membership seminar _____
- Official visit of district governor _____
- Assistant governor visits _____
- Club assemblies _____

Visit the RI Web site at www.Rotary.org for details on specific programs listed or contact your Club and District Administration representative with any questions. You may also download this form from the Rotary website.

As president-elect

➔ January

- 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 PETS.
- Encourage all incoming club officers and new members to attend the district assembly.

➔ February

- Hold the first meeting of the board-elect.

➔ March

- Attend PETS on _____ March.

➔ April

- Attend the district assembly with other incoming club officers on _____ April or May.

➔ May

- Review the status of current club projects and how they will affect the upcoming year.
- Hold club assembly to discuss plans made at district assembly and upcoming RI theme.

➔ **June**

- Finalize the *Planning Guide for Effective Rotary Clubs* and submit it to the district governor-elect prior to 1 July.
- Finalize the club budget for the coming year.
- Confer with the president to ensure a smooth transition.
- Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.
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As president

➔ **July Literacy Month.**

- Conduct literacy-related activities and programs.
- Plan and conduct monthly board meeting.
- Plan and conduct a club assembly to discuss and adopt the yearly program.
- Work with the club secretary to complete the RI Semiannual Report and send with dues to RI. Submit district per capita dues, if applicable. RI dues become past due on 1 August.
- 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.
- Nominate a club member for the Four Avenues of Service Citation for individual Rotarians, between 1 July and 30 June; president must endorse, and inform the governor. Contact the RI Recognition Section for details.
- Submit applications for Matching Grants.*
- Educate the club about the Group Study Exchange (GSE) program and promote it in your community. *
- Recruit young professions between the ages of 25-40 and encourage qualified candidates to submit a GSE Team Member Application. *
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➔ **August** *Membership and Extension Month.*

- Conduct club activities to support membership development and extension efforts.
- 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.
- Promote attendance at the district membership seminar.
- Consider nominating a club member for The Rotary Foundation District Service Award, The Rotary Foundation Citation for Meritorious Service, or The Rotary Foundation Distinguished Service Award. *
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➔ **September** *New Generations Month.*

- Conduct youth-related activities and programs.
- Monitor membership development goals and projects.
- 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.
- Endorse qualified GSE team members' applications and submit them to the District GSE Selection Committee for consideration. *
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➔ **October** *Vocational Service Month.*

- Conduct vocation-related activities and programs.
- Monitor membership development goals and projects.
- 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.
- Ambassadorial Scholarships: applications from districts due to The

Rotary Foundation by 1 October. Check with the district scholarships chairperson for district deadline. *

- Rotary Grants for University Teachers: application deadline from the district to The Rotary Foundation is 1 October. Check with the district scholarship chairperson for district deadline. *
- Rotary World Peace Scholarships: application deadline from the district to The Rotary Foundation is 1 October. Check with the district scholarship chairperson for district deadline. *
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➔ **November** *Rotary Foundation Month.*

- Conduct related activities and programs on Rotary Foundation programs and fund development.
- 1 November is the deadline for receipt at RI of nominations for the Rotary Award for World Understanding and Peace. Contact the RI Recognition Section for details.
- The week including 5 November is *World Interact Week*. Support your local Interact club or help organize one.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- 15 November: Nominations for The Rotary Foundation Distinguished Service Award deadline. *
- 15 November: (USA clubs only) Deadline to submit IRS form 990, and possibly form 990-T, to the Internal Revenue Service. Contact the IRS for report forms, filing limits and other requirements.
- Send monthly membership and attendance report to the district governor or district secretary.
- Offer club's assistance in hosting visiting GSE teams in the district. *
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➔ **December**

- Hold annual club election no later than the end of December.

- Report next year's club president and secretary to RI for the *Official Directory*, and to the district governor-elect by 31 January.
- Monitor membership development goals and projects.
- 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.
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➔ **January Rotary Awareness 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.
- Work with the club secretary to complete the Semiannual Report and send with dues to RI. Submit district per capita dues, if applicable. RI dues become past due on 1 February.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Plan and conduct club assembly to review progress toward club goals.
- Conduct a semiannual checkup on all committee activities and objectives.
- Send monthly membership and attendance report to the district governor or district secretary.
- Promote attendance at the district conference.
- Promote availability of Ambassadorial Scholarships and 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 Scholarships. Check with district scholarships chairperson on deadline for clubs to submit applications for the district-level competition. *
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➔ **February** *World Understanding Month.*

- Conduct club activities to promote world understanding and peace.
- The second week of February is *Family Week*. Conduct activities to demonstrate your club's commitment to family and community.
- 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 goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the RI Convention.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary.
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➔ **March**

- The week including 13 March is *World Rotaract Week*. Conduct activities in support of your local Rotaract club or help organize one.
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- 15 March is the deadline for governors to submit one club nomination for the RI Significant Achievement Award. Contact the district governor for details.
- Send monthly membership and attendance report to the district governor or district secretary.
- 31 March is the last day to submit Matching Grant or District Simplified Grant applications for funding consideration in the current Rotary year ✱
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➔ **April** *Magazine Month.*

- Conduct a club program on *The Rotarian* magazine or a regional magazine.

- Nominations for The Rotary Foundation Citation for Meritorious Service received after 15 May will be returned to the nominator. Contact your district governor for details. *
- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- 15 April is the 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.
- Send monthly membership and attendance report to the district governor or district secretary.
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➔ **May**

- Monitor membership development goals and projects.
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- 15 May is the deadline for governors to submit one club nomination for the RI Public Relations Award. Contact the district governor for details.
- Send monthly membership and attendance report to the district governor or district secretary.
- 15 May: Nominations for The Rotary Foundation Citation for Meritorious Service deadline. *
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➔ **June** *Rotary Fellowships Month.*

- Promote club members' participation in Rotary Fellowships.
- Send club representatives to the RI Convention.
- Together with the club secretary and treasurer, prepare a year-end audit of the club's financial transactions. Submit a financial statement to the club regarding its fiscal status.
- Monitor membership development goals and projects. Provide the club

with a final report on membership growth.

- Confer with president-elect to ensure a smooth transition.
- Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.
- Promote attendance at the district conference.
- Send monthly membership and attendance report to the district governor or district secretary.
- Assess all Humanitarian Grant activity and provide progress or final reports to The Rotary Foundation for all open grant projects.
- Plan a dignified ceremony for the installation of next year's club officers.
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