**Club President’s Monthly Checklist**

This checklist is designed to help Rotary club presidents-elect 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 check off (X) each box after the item has been addressed to your satisfaction. An asterisk (\*) indicates a Rotary Foundation-related item. You can contact your assigned Rotary International Club and District Support person if you have questions about any Rotary issue.

As Club President-elect you are encouraged to complete these activities to help you create your team that will support you and help you plan for your year as President.

**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 the Pre-PETS Training event and Mid-Atlantic Presidents-elect Training Seminar (MAPETS)

• Encourage all incoming club officers and new members to attend the District Training Assembly.

• Check with the District Rotary Foundation Chair to determine the availability of DDF to support projects \*

• Check with the District Scholarships Subcommittee Chair to determine the district deadline to submit Peace Scholar and Global Grant applications.\*

• Identify and recruit a public relations (PR) chairperson and committee for the club.

• Obtain Rotary Foundation contribution and recognition reports from current club leaders via Club Central

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**February -World Understanding Month**

• Make sure that your club secretary registers you, your incoming Club Secretary, Club Treasurer and Club Foundation and Membership Committee Chairs with Rotary International so that you and they can use Rotary Club Central.

* Attend Pre-PETS and MAPETS.
* Distribute Club Officer and Committee Manuals and the Presidential Citation brochure and the Rotary Club Central Worksheet to your leadership team and ask them to use the committee manual and Presidential Citation form to formulate their goals and action plans and to send the completed form to for you to enter on Club Central in May to guide your club.

• Encourage your public relations committee to read the Club Public Relations Manual; to register on the Rotary International website and use the numerous PR materials found in the My Rotary section; register for Rotary PR Tips, e-newsletter, and ordering PR training materials. .\*

* Conduct a Community Needs Assessment to set meaningful service goals for your year.

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**March -Literacy Month**

* Attend MAPETS.

• Encourage all incoming club officers and new members to attend the District Training Assembly.

• Work with the current club president to ensure continuity.

• 30 March: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 65% of Annual Programs Fund goal achievement.\*

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**April -Magazine Month**

• Attend the District Training Assembly with other incoming club officers in April or May.

• Ask the PR chair to finalize the PR plan for the club, and identify key local media contacts.

* Rotarians at Work Day: Conduct a visible service project in your community to increase awareness of your club and recruit new members.
* Finalize the club budget for the coming year.
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**May**

• Hold the first meeting of the board-elect to review the status of current club projects and how they will affect planning for the upcoming year.

• Review the status of current grants and ensure progress/final reports have been submitted.

• Hold a club assembly to discuss your goals and activities to achieve those goals.

• Confer with the secretary and incoming secretary to update the RI membership database via dacdb before 1 June, so that the July invoice from Rotary International will be up-to-date and accurate.

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**June -Rotary Fellowships Month**

• Enter data on Rotary Club Central before 1 July.

• 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.

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**As Club President**

**July**

• Plan and conduct monthly board meeting.

• Promote attendance at the district conference.

• Initiate membership development programs for the year.

• Ensure that the club invoice has been paid 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.

• Review information about Rotary International and District awards and take action as required to get recognition.

• Begin submitting applications for Matching Grants. Although the deadline for submission is not until 31 March, clubs are strongly encouraged to submit their applications as early as possible during the year.

• Update classification roster. Prepare current list of filled and unfilled classifications.

• Rotary World Peace Fellowships: applications due to The Rotary Foundation from districts by 1 July.

• Lead by example and encourage every Rotarian to make a personal contribution to The Rotary Foundation or enroll in Rotary Direct at the first meeting of the new year or in the month of July.

• Ask the PR chair to promote the club as planned

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**August -Membership and Extension Month**

• Plan and conduct monthly board meeting.

• Promote attendance at the district conference.

• Conduct club activities to support membership development by inducting appropriate Rotary Foundation alumni into membership in the club and working to help create new clubs.

• Promote attendance at the district Rotary Foundation seminar.

• 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.

• Ask the PR chair to promote club as planned – including any literacy projects for 8 September, International Literacy Day.

• Log on to Rotary Club Central and download TRF contribution and recognition reports like new Paul Harris Fellows, etc. This task can also be assigned to the club secretary, treasurer or club Foundation chair\*

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**September -New Generations Month**

• Plan and conduct monthly board meeting.

• Promote attendance at the district conference.

• Highlight and promote youth-related activities and programs and celebrate club success in Interact, Rotaract, RYLA and Youth Exchange programs.

• Submit a club project in need of funding, volunteers, donated goods and/or partners for a Rotary Foundation Matching Grant, or completed projects that can be used as examples of best practices to be posted on Project LINK, RI’s online searchable database.

• Monitor membership development initiatives and goals.

• Ask the PR chair to promote club as planned – including any polio efforts for 24 October, World Polio Day.

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**October -Vocational Service Month**

• Plan and conduct monthly board meeting.

• Promote attendance at the district conference.

• Conduct vocation-related activities and programs.

• Monitor membership development initiatives and goals.

• Global Grant Scholarships: 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

• Continue submitting applications for Matching Grants. (Deadline is 31 March, but check with district TRF chair and Rotary’s website for updated schedule information)\*

• Log on to Club Central and download TRF contribution and recognition reports.\*

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**November -Rotary Foundation Month**

• Plan and conduct monthly board meeting.

• Promote attendance at the district conference.

• Conduct related activities and programs on Rotary Foundation programs, including PolioPlus, and fund development\*. (e.g. Paul Harris Fellows, Paul Harris Society, 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: 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).

• Ask the PR chair to promote club as planned – including any health or educational projects related to 1 December, World AIDS Day.

• Recognize all of the club’s Major Donors, Bequest Society Members, Benefactors, Paul Harris Society members, and Paul Harris Fellows with special acknowledgement during Rotary Foundation Month.\*

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**December -Family Month**

• Plan and conduct monthly board meeting.

• Plan to send a club representative to the RI Convention. Check Rotary.org for the registration deadline

• Consult with the secretary to update the district database on or before 1 December, so that the January invoice from Rotary International will be up to date and accurate.

• Assess the progress of club projects and provide progress reports for 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.

• 31 December: Deadline for reporting next year’s club president; secretary; treasurer; Foundation and Membership Committee chairs • Monitor membership development initiatives and goals.

• 15 December – New deadline for submitting Competitive Matching Grant Applications for consideration at the April Trustee Meeting

• 15 December: Encourage members to make TRF contributions prior to this date in order to receive (USA) tax receipts.

• 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.

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**January -Rotary Awareness Month**

• Plan and conduct monthly board meeting.

• Conduct activities and programs to provide members with continuing education on RI and to publicize Rotary to the community.

• Verify with the club secretary that the January invoice has been received and paid. 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 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.

• Ask the PR chair to promote club as planned – including Rotary’s anniversary on 23 February

• Follow-up with the district governor to confirm any district celebration plans.

• Remind club members about upcoming 31 March deadline for submitting applications for Matching Grants.

• Log on to Rotary Club Central and download TRF contribution and recognition reports.

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**February -World Understanding Month**

• Plan and conduct monthly board meeting.

• 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.

• Promote Benefactor program as a way to build a brighter future for TRF’s programs on Rotary’s birthday.\*

• Ask the PR chair to promote water and environmental projects for 22 March, World Water Day.

• 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.

• Log on to Rotary Club Central and download TRF contribution and recognition reports.

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**March -Literacy Month**

• Plan and conduct monthly board meeting.

• Promote attendance at the district conference.

• Conduct literacy related activities and programs.

• 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.

• 31 March: Last day to submit a Matching Grant application for funding consideration in the current Rotary year. \*

• 31 March: deadline to submit completed Presidential Citation questionnaire (900) to district governor (do not send questionnaire to RI)

• Ask the PR chair to promote club as planned – including environmental or sustainable development projects for 22 April, Earth Day.

• Clubs conduct the interview and selection process for the Rotary World Peace Fellowship and submit their club-endorsed Fellowship applications to the district in accordance with the district deadline.\*

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**April -Magazine Month**

• Plan and conduct monthly board meeting.

• Promote attendance at the district conference.

• 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.

• Ask the PR chair to share PR plan with incoming committee, including media contact list; offer ongoing training as needed.

• Log on to Rotary Club Central and download TRF contribution and recognition reports.

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**May**

• Plan and conduct monthly board meeting.

• Promote attendance at the district conference.

• Monitor membership development initiatives and goals.

• Review the status of current Grants and ensure progress/final reports have been submitted.

• 15 May: Deadline to submit nominations for The Rotary Foundation Citation for Meritorious Service.

• Ask the PR chair to promote club as planned – including any local or global community service projects

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**June -Rotary Fellowships Month**

• 1 June: Review Annual Programs Fund (EREY) goal achievement. Ensure that all contributions are sent in by 15 June to be credited in the current Rotary year.

• 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.

• 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 status update for 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 Grants activity and provide progress or final reports to The Rotary Foundation for all open grant projects.

• Rotary World Peace Fellowships: applications due to The Rotary Foundation from districts by 1 July.

• Plan a dignified ceremony for the installation of next year’s club officers. Recognize and thank donors for their support for The Rotary Foundation.

• Highlight any media coverage received and thank the PR committee for their outreach efforts.

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