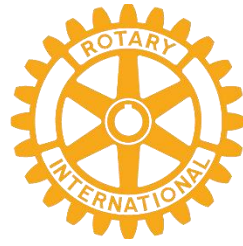


# Rotary



## Club President's Monthly Checklist

This checklist is designed to help Rotary club president's 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 12 months. 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>

District conference April 28-29 – Columbia

District leadership seminar No date has been set

District membership seminar August 6 (Newberry)

District Rotary Foundation Event November 3, 2022

**Official visit of district governor** July-January 2023  
**(will want to meet with Board and officers)**

Assistant governor visits They normally come once a quarter and the DG visit Meeting (they'll introduce the DG at his visit)

Installation of club officers June 2023

Visit [www.rotary.org](http://www.rotary.org), for details on programs listed or contact your Club and District Support representative with questions.

Take lots of photos of events and meetings. Send copies of photos you're most proud of to Faith ([admin@rotary7750.org](mailto:admin@rotary7750.org)) for the District's Facebook page and Sue Poss ([editor@rotary7750.org](mailto:editor@rotary7750.org)) for the District Newsletter – deadline for the newsletter is the 25<sup>th</sup> of each month. You can include a short description or just a byline.

## **As Club President**

---

### **July - Transition Month**

- Plan and conduct monthly board meeting.
- **Induct new officers, if not done in June**
- **Promote attendance at the district membership seminar on August 6.**
- 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\*.
- **Work with the treasurer to send dues to RI.** Submit district per capita dues in August. A past-due reminder notice will be sent on 1 October if RI dues have not yet been paid.
- Ask the PR chair to promote the club as planned
- \_\_\_\_\_
- \_\_\_\_\_

### **August – Membership and Extension Month**

- **Membership Summits will be held on August 6 in Newberry.**
- Plan and conduct monthly board meeting.
- **Work with the treasurer to submit district per capita dues. Invoice will be sent in July or August.**
- The Club Secretary should submit monthly membership and attendance reports through DACdb no later than 15 days after the last meeting of the month.
- Conduct club activities to support membership development efforts.
- **Promote attendance at the district Rotary Foundation Celebration on November 3.**
- 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. \* You can find more information on MyRotary.org.
- Ask the PR chair to promote club as planned – including any literacy projects for September 8, International Literacy Day.

- \_\_\_\_\_
- \_\_\_\_\_

### **September – Basic Education and Literacy Month**

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- The Club Secretary should submit monthly membership and attendance reports through DACdb no later than 15 days after the last meeting of the month.
- Conduct Education and Literacy activities and programs.
- Celebrate International Literacy Day – September 8.
- Monitor membership development initiatives and goals.
- Ask the PR chair to promote club as planned – including any polio efforts for World Polio Day on October 24.
- \_\_\_\_\_
- \_\_\_\_\_

### **October – Economic and Community Development Month**

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- The Club Secretary should submit monthly membership and attendance reports through DACdb no later than 15 days after the last meeting of the month.
- Conduct Economic and Community Development related activities and programs.
- Monitor membership development initiatives and goals.
- Celebrate World Polio Day on October 24.
- 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 the club as planned – including any service projects that might be highlighted by local media during the upcoming holidays.

- \_\_\_\_\_
- \_\_\_\_\_

### **November - Rotary Foundation Month**

- **Foundation Event will be held on November 3, 2022**
- **November 15: 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](http://www.irs.ustreas.gov)). Every club must complete this form each year.**
- Plan and conduct monthly board meeting
- Promote attendance at the district conference.
- The Club Secretary should submit monthly membership and attendance reports through DACdb 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](http://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. **By doing this you will ensure that you aren't charged for members that are no longer in your club.**
- 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 November 5<sup>th</sup> is World Interact Week. Support your local Interact club or help organize one.
- Monitor membership development initiatives and goals.
- Ask the PR chair to promote club as planned – including any health or educational projects related to 1 December, World AIDS Day.
- \_\_\_\_\_
- \_\_\_\_\_

### **December – Disease Prevention and Treatment Month**

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference (April 28-29, 2023.)
- The Club Secretary should submit monthly membership and attendance reports 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](http://www.rotary.org) / member access, **on or before December 1**, so that the January semiannual report (SAR) from Rotary International will be up-to-date and accurate.
- Conduct activities/programs to demonstrate your club's commitment to Disease Prevention and Treatment.
- **Hold annual club elections no later than December 31.**
- Monitor membership development initiatives and goals.
- 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 - Vocational Service Month**

- Plan and conduct monthly board meeting.
- **Register your PE for PETS – it is March 16-18, 2023. Registration deadline is January 20, 2023**
- The Club Secretary should submit monthly membership and attendance reports no later than 15 days after the last meeting of the month.
- Conduct activities and programs on Vocational Service.
- **Plan to send club representatives to the district conference (April 28-29, 2023) and to the RI Convention (Melbourne, Australia, May 27-31, 2023)**
- Work with the club treasurer to send dues to RI. 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.
- **January 31 is the deadline for reporting next year's club president and secretary to RI, the district governor-elect, and the district administrator**
- Ask the PR chair to promote club as planned – including Rotary's anniversary on February 23.

- \_\_\_\_\_
- \_\_\_\_\_

### **February - Peace and Conflict Prevention/Resolution Month**

- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- The Club Secretary should submit monthly membership and attendance reports no later than 15 days after the last meeting of the month.
- **February 23 (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 - Water and Sanitation Month**

- **PETS is March 16-18, 2023 in Greensboro, NC.**
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Conduct Water and Sanitation related activities and programs.
- The Club Secretary should submit monthly membership and attendance reports no later than 15 days after the last meeting of the month.
- Week including March 13<sup>th</sup> is World Rotaract Week. Conduct activities in support of your local Rotaract club or help organize one.
- Monitor membership development initiatives and goals.
- 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, the RI Web site and PR Tips e-newsletter, to the committee.

- \_\_\_\_\_
- \_\_\_\_\_

### **April – Maternal and Child Health Month**

- Plan and conduct monthly board meeting.
- **Grant applications for 2023-24 grants have to be in by April 30, 2023. You can apply as early as November, 2022.**
- **Grant reports for the 2022-23 year are due April 15, 2023.**
- **District Conference – April 28-29, 2023 –Columbia. Encourage members to attend.**
- The Club Secretary should submit monthly membership and attendance reports no later than 15 days after the last meeting of the month.
- Conduct maternal and child health activities and programs.
- 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.
- \_\_\_\_\_
- \_\_\_\_\_

### **May - Youth Service Month**

- **The Governor’s Excellence Award application is due May 16.**
- **Your PE’s Club Planning Guide is due May 15. Remind them to look at it over the course of the year so that they’ll stay on track**
- Plan and conduct monthly board meeting.
- The Club Secretary should submit monthly membership and attendance reports 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.

- Ask the PR chair to promote club as planned – including any local or global community service projects.
- \_\_\_\_\_
- \_\_\_\_\_

**June - Rotary Fellowships Month**

- **The Rotary Citation is due by June 30. Enter goals achieved in Rotary Club Central ([myrotary.org](http://myrotary.org))**
- **The President and President-Elect, along with other members should attend the District Installation and Awards Banquet (date/place TBA) if at all possible.**
- **Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.**
- Submit final contributions to The Rotary Foundation before June 30<sup>th</sup>.
- The Club Secretary should submit monthly membership and attendance reports no later than 15 days after the last meeting of the month.
- Promote club members' participation in Rotary Fellowships. [www.rotary.org/fellowships](http://www.rotary.org/fellowships).
- Prepare a final report to the club on its Rotary Foundation goal achievements and program participation\*.
- 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 action.
- Confer with the president-elect to ensure a smooth transition.
- Plan a ceremony for the installation of next year's club officers.
- Highlight any media coverage received during the year and thank the PR committee for their outreach efforts.
- \_\_\_\_\_
- \_\_\_\_\_