

Club Presidents Checklist (2022-23)

This checklist is designed to help Rotary club presidents-elect and 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 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 might 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.

Important Dates: Reserve on your calendar NOW!

PETS	March 26, 2022
Area Governor Presentation to Club	July or August 2022
Grants Management Seminars	April 13, 26, May 5, 17, 2022 Virtual
Annual Meeting	May 12, 2022 7-8pm virtual
District conference	21-22 Conference: July 7-8-9, 2022 Council Bluffs
Vibrant Club Workshops	TBA
Official visit of district governor	Invite Barbara to participate in a club project, event, social, board meeting, and/or club meeting
Area governor quarterly visits	Meeting with fellow presidents in your area with your AG
Online Club Presidents meeting	every third Monday through June by Zoom 6:00 PM
Rotary Leadership Institute	TBA
RI International Convention	June 4-8, 2022 Houston May 27-31, 2023 Melbourne, Australia

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>.

Please feel free to modify this document to fit your own club culture, add and remove events and especially pass it along to the next person!

New website at RI: <https://www.rotary.org/myrotary/en/president>



Club President-elect

July 2021 Thru October 2021

- Participate in Board Meetings and Finance Committee Meetings.
- Throughout your PE year, try to visit as many other club's meetings as you can.

November 2021

- Participate in Board Meetings and Finance Committee Meetings.
- Participate in Assistant Governor Meeting

December 2021

- Participate in Board Meetings and Finance Committee Meetings.
- Select club secretary by end of month
- Submit photo for District Directory by end of the month
- 31 December: Register for Rotary International Convention before this date (likely reduced fee)

January 2022

- Participate in Board Meetings and Finance Committee Meetings.
- Work with committees to pick committee chairs for next year
- Begin developing goals and appointing committee chairs. (Your program committee chair should be first!)
- 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 meetings
- Obtain Rotary Foundation Contribution and recognition reports from current club leaders. *
- Identify and recruit a public relations (PR) chairperson and committee for the club.
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February 2022

- Participate in Board Meetings and Finance Committee Meetings.**
- Research what the upcoming Rotary Dues and District Dues per capita will be – include in budget.
- Encourage all incoming club officers and new members to review materials in Rotary Learning Center.
- 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.
- Obtain contribution and recognition reports from current club leaders.*
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March 2022

- Attend PETS
- Participate in Board Meetings and Finance Committee Meetings.
- With President and Finance Committee: finalize budget for next year, finalize Dues Statement to be sent to members.
- Set the club’s annual giving goal to The Rotary Foundation, taking into account the “*Every Rotarian Every Year*” campaign*. Enter in Rotary Club Central.
- Using the RI Presidential Citation and the Rotary Action Plan 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 (membership and empowering girls).
- Register to use Club Central and ensure incoming Club Secretary has also registered (www.rotary.org/myrotary)
- Encourage the incoming PR committee to develop a PR plan for the next Rotary year. Review the publication *Effective Public Relations* (#257) for more information
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April 2022

- Participate in District meetings– encourage club committee chairs to also participate
- Participate in Board Meetings and Finance Committee Meetings.
- Conduct training of Committee Chairs in conjunction with District Assembly
- Confirm all other committee positions are filled.
- Ask the incoming PR chair to finalize the PR plan for the club and identify key local media contacts.
- Obtain contribution and recognition reports from current club leaders.*
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May 2022

- Finalize the planning guide in Rotary Club Central online.
- Finalize Rotary Foundation contribution goals, Polio goals, and memberships for the coming year in Rotary Club Central.
- Participate in Board Meetings and Finance Committee Meetings
- Hold the first meeting of the board-elect – Board Training Workbook or make sure the board knows what they are supposed to do and when meetings are held.
- Review the status of current club projects and how they will affect planning for the upcoming year.



- Plan club assembly to discuss plans made at district assembly and upcoming RI theme with board. Discuss goals set for giving to The Rotary Foundation. Set date for July
- Ask the incoming PR chair to develop a list of prospective media contacts and an outreach calendar based on the PR plan.
- Confer with secretary to update the RI Membership database via the web on or before 1 June so that the July semiannual report (SAR) from Rotary International will be up-to-date and accurate.
- Schedule Assistant Governor Presentation to the Club for July or August
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June 2022

- Participate in Board Meetings and Finance Committee Meetings.
- 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
- Attend the Vibrant Club Workshop
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Club President

July 2022

- Plan and conduct monthly board meeting.
- Prepare for Assistant Governor presentation to your club (Sometime July-August)
- Initiate membership development programs for the year.
- Make sure all goals are listed in Club Central; Select your goals for the Rotary Citation
- Review current RI sponsored membership development certificate programs.
- Verify with the club secretary that the July 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.
- 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*.
- Log on to Club Central and download TRF contribution and recognition reports.
- Ask the PR chair to promote the club as planned
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August 2022- Membership and New Club Development Month

- Plan and conduct monthly board meeting.
- Conduct club activities to support membership development and extension efforts.
- Ask the PR chair to promote club as planned – including any literacy projects for 8 September, International Literacy Day.
- Log on to Club Central and download TRF contribution and recognition reports.
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September 2022– Basic Education and Literacy Month

- Plan and conduct monthly board meeting.
- Promote attendance at the district meetings.
- Submit a club project in need of funding, volunteers, donated goods and/or partners for a Rotary Foundation Global 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, update information in Rotary Club Central.

- Monitor committee progress towards goals with club board members
- Nominate candidates to attend Rotary Leadership Institute future meetings
- Ask the PR chair to promote club as planned – including any polio efforts for 24 October, World Polio Day.
- 30 September: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 20% of Annual Program Fund goal achievement.*
- Sign up for the fall Vibrant Club Workshop—encourage club members to do so also
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October 2022– Economic & Community Development Month

- No later than October 1: Appoint nominating Committee to confirm upcoming president nominees and future Board members. [You may want to do this when you appoint your committees in the spring] (See April)
- Plan and conduct monthly board meeting.
- Monitor membership development initiatives and goals. Update goals in Club Central.
- 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
- Log on to Club Central and download TRF contribution and recognition reports.
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November 2022- Rotary Foundation Month

- Participate in Assistant Governor Meeting
- Plan and conduct monthly board meeting.
- Confer with secretary to update the RI Membership database before 1 January 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.
- Ask the PR chair to promote club as planned – including any health or educational projects related to 1 December, World AIDS Day.
- 30 November: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 33% of Annual Program Fund goal achievement.*

- 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 2022– Disease Prevention and Treatment Month

- Hold Club Elections
- Plan and conduct monthly board meeting.
- 31 Dec – District Grant Project Report Due: either a Project Progress Report or Project Final Report needs to be submitted, whichever is appropriate
- Conduct activities to demonstrate your club’s commitment to family and community – this used to be Family month.
- Hold annual club election no later than 31 December [Confirm next year President Elect, incoming board members.]
- Prepare a mid-year review the club’s financial transactions, working with club secretary and treasurer. Submit a financial statement to the club about its fiscal status. [New in the club constitution model]
- 31 December: Deadline for reporting next year’s club president and secretary to RI for the Official Directory (007-EN), and to the district governor-elect.
- 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*.
- 30 December: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 50% of Annual Program Fund goal achievement.*
- Ask the PR chair to promote club as planned – including any family or service projects related to the holidays.
- Sign up for the winter Vibrant Club Workshop—encourage club members to do so also
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January 2023- Vocational Service Month

- Plan and conduct monthly board meeting.
- Review and nominate any member for the District Cadwallader Award (due May 1)
- Promote attendance at the district conference.
- 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.
- Monitor membership development initiatives and goals.
- It’s vocational service month – have a program talking about the ways that Rotary can help improve your vocational skills.
- Conduct a semiannual checkup on all committee activities and objectives.
- Plan and conduct club assembly to review progress toward all club goals.
- Update goals and accomplishments in Club Central
- 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 celebration plans district wide.
- Remind club members about upcoming 31 May deadline for submitting applications for Grants.
- Recruit club members to attend Grants Management Seminar.
- Log on to Club Central and download TRF contribution and recognition reports.
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February 2023– Peace and Conflict Prevention/Resolution Month

- Plan and conduct monthly board meeting.
- Endorse the nomination of a club member for the Four Avenues of Service Citation for individual Rotarians – Inform District Governor and contact RI
- Update information on goals and performance in Rotary Club Central. Help President Elect set their goals in Rotary Club Central.
- Nominate candidates to attend Rotary Leadership Institute future classes
- Promote attendance at the district conference and assembly.
- Conduct club activities to promote world understanding and peace and bring up Rotary’s involvement with the Peace Centers.
- 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.
- Log on to Club Central and download TRF contribution and recognition reports.
- Sign up for the spring Vibrant Club Workshop—encourage club members to do so also
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March 2023– Water, Sanitation and Hygiene Month

- Participate in Assistant Governor Meeting
- Plan and conduct monthly board meeting.
- With President Elect and Finance Committee: finalize budget for next year, finalize Dues Statement to be sent to members.
- 31 March: District Grant Project Complete Date – projects can finish earlier but not later than this date. Project Final Report is due if not already submitted.
- Promote attendance at the district conference and assembly.
- Conduct literacy related activities and programs – this used to be Literacy month
- Bring up Rotary’s role in Water and Sanitation projects around the world
- 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.
- 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.
- 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 2023– Maternal and Child Health Month

- Participate in Assistant Governor Meeting
- Monitor committee progress towards goals with board members
- Appoint Voting Delegates for District Conference
- Plan and conduct monthly board meeting.
- Promote attendance at the district conference.
- Conduct a club program on THE ROTARIAN or a Rotary regional magazine – this used to be Magazine month!
- Monitor membership development initiatives and goals.
- Update goals in Club Central.
- Ask the PR chair to share PR plan with incoming committee, including media contact list; offer ongoing training as needed.

- Make sure nomination of any member for the District Cadwallader Award has been submitted (due May 1)
- Log on to Club Central and download TRF contribution and recognition reports.
- Rotary International Convention registrations and ticket cancellations are due.
- Encourage members to help with RYLA (Rotary Youth Leadership Award) Camp
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May 2023– Youth Service Month

- 31 May: Last day to submit a District Grant application for funding consideration in the current Rotary year.*
- Make sure at least two club members have attended a Grant Management Seminar
- Plan and conduct monthly board meeting. Invite incoming board members to attend.
- Conduct youth-related activities and programs and celebrate club success in Interact, Rotaract, RYLA and Youth Exchange programs to celebrate Youth Service Month.
- Promote attendance at the district conference.
- Monitor membership development initiatives and goals.
- Review the status of current Humanitarian Grants and ensure progress/final reports have been submitted*.
- Ask the PR chair to promote club as planned – including any local or global community service projects
- Log on to Club Central and download TRF contribution and recognition reports.
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June 2023- Rotary Fellowships Month

- 1 June: Review Interim Monthly Contribution Report (MCR) toward 100% of Annual Programs fund 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.
- Update goals in Club Central.
- 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 – provide a list of fellowships and have everyone select one they might be interested in.
- 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.
- Plan a ceremony for the installation of next year's club officers.
- Highlight any media coverage received and thank the PR committee for their outreach efforts.
- Ensure Young Leaders are invited to attend the Leadership Development Seminar on June 23 in Council Bluffs
- Attend RI Convention
- Attend District Conference
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Final Duties – Immediate Past President

July 2023 – June 2024

As Immediate Past President, you are still a vital part of the Club Board of Directors and the Finance Committee – you should still plan on attending those meetings through the next June.

Don't disappear! Your club still needs your input in growing leaders – you've learned a lot this past year, be sure to share it by mentoring others.

September/October 2023

Check with your club - The Immediate Past President may be responsible for convening and chairing the Nominating Committee and reporting the results back to the board before the club's Annual Meeting.

Other duties as assigned by the club:

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