



2008-2009 Club President's Monthly Checklist Rotary District 6150

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.

You should 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>.

Mark your calendar with the dates of these important events and make sure that you attend. You can also use the blank lines in each month to add local events that are specific to your club.

Mid-America PETS April 4-5, 2008, Holiday Inn & Convention Center, Ft. Smith, AR

Club Leadership Retreat May 17, 2008, Student Union, ASU-Beebe, Beebe, AR

Rotary International Convention June 15-18, 2008, Los Angeles, CA

District Conference April 17-19, 2008, Memphis, TN

District Leadership Seminar March 29, 2008, ASU-Beebe, Beebe, AR

District Membership Seminar _____

District Rotary Foundation Seminars _____

Official Visit of District Governor _____

Assistant Governor Visits _____

Club Assemblies _____

Visit the RI Web site, www.rotary.org, for details on specific programs listed or contact your Assistant Governor with any questions. Visit your District website at: www.rotary6150.org

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 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, Rotary World Peace Fellowships programs and promote them in your community. *
- Educate your club about the Rotary Peace and Conflict Studies Program and promote it in your community. Begin recruiting applicants for the January-April program session. *
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February – World Understanding Month

- Hold the first meeting of the board-elect.
- Register for presidents-elect training seminar (P.E.T.S.).
- Encourage all incoming club officers and new members to attend the District Assembly (Club Leadership Retreat)
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March – Literacy Month

- Attend PETS on April 4-5, 2008**
- 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" on the RI website and ensure incoming Club Secretary has also registered.
- Contact Governor-elect Ray Keller 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*.
- Promote attendance at the District Conference in April
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April – Magazine Month

- Attend the "On the Road to Rotary" District Conference April 17-19 in Memphis, TN**
- Register for the Club Leadership Retreat (District Assembly) with other incoming club officers and club leaders
- Promote attendance at the Club Leadership Retreat in April
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May

- Review the status of current club projects and how they will affect planning for the upcoming year.
- Attend the Club Leadership Retreat in Beebe, AR on May 17 along with other incoming club officers and club leaders**
- Review the status of current Humanitarian Grants and ensure progress/final reports have been submitted*.
- Hold club assembly to discuss plans made at the Club Leadership Retreat and the 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 June 1 so that the July semiannual report (SAR) from Rotary International will be up-to-date and accurate.
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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 June 1 so that the July semiannual report (SAR) from Rotary International will be up-to-date and accurate
- Finalize the club budget for the coming year.
- Finalize the Planning Guide for Effective Rotary Clubs and submit it to the District Governor-Elect or Assistant Governor before 1 July.
- Confer with the outgoing 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 Club President

July

- Plan and conduct monthly board meeting.
- Initiate membership development programs for the year.
- Review current RI sponsored membership development certificate programs.
- Send monthly membership and attendance report to the 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 October 1 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 July 1 and June 30. Inform the governor. Contact the RI Programs staff for details at programs@Rotaryintl.org.
 - 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. *
 - Ambassadorial Scholarship due to District Scholarships Committee Chair July 15.
 - University Teacher grant applications due to District Scholarships Committee Chair.
 - Rotary World Peace Fellowships: applications due to The Rotary Foundation from districts by July 1. *
 - Rotary Peace and Conflict Studies Program applications for the January-April session due to The Rotary Foundation from Districts by July 1.
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August – Membership and Extension Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the District Administrator no later than 15 days after the last meeting of the month.
- Plan your Dictionary and other Literacy Projects. Go to www.rotaryliteracy.org for order forms and information.
- Conduct club activities to support membership development and extension efforts.
- 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. *
- Educate your club about the Rotary Peace and Conflict Studies Program and promote it in your community. Begin recruiting applicants for the July-September program session*.
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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 Administrator 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 goals and projects.
- Recruit young professions between the ages of 25-40 and encourage qualified candidates to submit a GSE Team Member Application. *
- Endorse qualified GSE team members' applications and submit them to the District GSE selection committee by their deadline for consideration.
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October – Vocational Service Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the District Administrator no later than 15 days after the last meeting of the month.
- Conduct vocation-related activities and programs.
- Monitor membership development goals and projects.
- Ambassadorial Scholarships: applications due to The Rotary Foundation from districts by 1 October. Check with district scholarships chair for district deadline. *
- Rotary Grants for University Teachers: applications due to The Rotary Foundation from districts by 1 October. Check with district scholarships chair for district deadline. *
- Rotary World Peace Scholarships: applications due to The Rotary Foundation from districts by 1 October. Check with district scholarships chair for district deadline. *
- 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. *
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November – Rotary Foundation Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the District Administrator no later than 15 days after the last meeting of the 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 December 1 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.
- 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** (U.S. 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. *

December – Family Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the District Administrator no later than 15 days after the last meeting of the 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 December 1 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 December 1.
- Monitor membership development goals and projects.
- Rotary Peace and Conflict Studies Program: applications for the July-September session due to The Rotary Foundation from districts by December 2. *

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January 2009 – Rotary Awareness Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the District Administrator 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 April 2 if RI dues have not yet been paid.
- Monitor membership development goals and projects.
- Conduct a semiannual check-up on all committee activities and objectives.
- Plan and conduct Club Assembly to review progress toward club goals.
- Recruit students for RYLA.
- 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 Scholarships. Check with district scholarships 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.
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February 2009 – World Understanding Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the District Administrator 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 goals and conduct monthly board meeting.
- Promote attendance at the RI Convention.
- Submit RYLA applications to RYLA Chair.
- Insure that your club president-elect is registered for PETS.
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March 2009 – Literacy Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the District Administrator no later than 15 days after the last meeting of the month.
- Monitor membership development goals and projects.
- 15 March: Deadline for governors to submit one club nomination for RI’s Significant Achievement Award. Contact the AG for details.
- 31 March: Last day to submit Matching Grant or District Simplified Grant applications for funding consideration in the current Rotary year. *
- Arrange transportation for RYLA campers
- Insure that your club president-elect attends Mid-America PETS, March 20-21, 2009**
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April 2009 – Magazine Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the 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 Administrator for details. *
- Monitor membership development goals and projects.
- Promote attendance at the District Assembly (Club Leadership Retreat).
- 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.
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May 2009

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the District Secretary no later than 15 days after the last meeting of the month.
- Monitor membership development goals and projects.
- Attend the District Assembly (Club Leadership Retreat).
- 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. *
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June 2009 – Rotary Fellowships Month

- Plan and conduct monthly board meeting.
- Send monthly membership and attendance report to the 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 goals and projects. Provide the club with a final report on membership growth.
- Confer with the president-elect to ensure a smooth transition.
- Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.
- 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 July 1*.
- Plan a dignified ceremony for the installation of next year's club officers.
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