

# Club Presidents Checklist (2024-25)

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This checklist is designed to help Rotary club presidents-elect (PE) 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. **Delegate as much as possible.**

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

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://my.rotary.org/en/learning-reference/learn-role/president>

District website: <https://www.rotary7600.org/>

## Club President-elect

### July 2023 Thru October 2023

- Attend Club Board Meetings and Club Finance Committee Meetings.

### November 2023

- Attend Club Board Meetings and Club Finance Committee Meetings.
- Attend Virtual Pre-PETS. Recordings are here: <https://www.rotary7600.org/district-resources/training-seminar-recordings/>

### December 2023

- Attend Board Meetings and Finance Committee Meetings.
- Club Annual meeting and elections. Officers are entered into DACdb by December 31.
- 31 December: Register for Rotary International Convention before this date (likely reduced fee)
- Attend Virtual Pre-PETS. Recordings are here: <https://www.rotary7600.org/district-resources/training-seminar-recordings/>

### January 2024

- Attend Board Meetings and Finance Committee Meetings.
- 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)
- Attend Pre-Presidents Elec Training Seminar/Presidential Retreat
- Participate in Virtual Pre-PETS. Recordings are here: <https://www.rotary7600.org/district-resources/training-seminar-recordings/>

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### February 2024

- Attend Board Meetings and Finance Committee Meetings.
- Incoming club officers and new members, review materials in Rotary Learning Center.

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### March 2024

- Attend Chesapeake PETS
- Attend Board Meetings and Finance Committee Meetings.
- With President and Finance Committee: finalize budget for next year.
- Ensure someone from club attends District Grant Seminar.
- Using the Rotary Citation and the Rotary Action Plan as guides, develop a well-rounded plan for the year incorporating projects and activities.

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### April 2024

- Conduct orientation of Committee Chairs in conjunction with District Assembly –

- Have board and committee members attend District Training Assembly.
- Attend Board Meetings and Finance Committee Meetings.
- Confirm all other committee positions are filled.
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**May 2024**

- Finalize club goals in Rotary Club Central online.
- Finalize Rotary Foundation contribution goals, Polio goals – **Due May 1.**
- Attend Board Meetings and Finance Committee Meetings
- Submit District Grant Application and MOU to DACdb – **Due May 15.**
- Hold the first meeting of the board-elect – make sure the board knows what they are supposed to do and when meetings are held. Approve the annual calendar/plan of work and budget.
- Confer with secretary to update the RI Membership database via the web on or before 1 June so that the July semiannual report from Rotary International will be up-to-date and accurate.
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**June 2024**

- Attend 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.
- Club Change of Leadership Event occurs.
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**Club President**

**July 2024**

- Conduct monthly board meeting.
- Participate in Assistant Governor Meeting.
- Prepare for District Governor presentation to your club (Sometime July-January).
- Promote District Conference.
- Make sure all goals are listed in Club Central; Select your goals for the Rotary Citation
- Verify with the club secretary and treasurer that semiannual report has been received and RI dues paid to RI. Submit district per capita dues.

- 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.
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**August 2024 - Membership and New Club Development Month**

- Conduct monthly board meeting.
- Participate in Assistant Governor Meeting.
- Conduct club activities to support membership development and extension efforts.
- Promote District Conference.
- Attend and encourage club members to attend Vibrant Club Workshop/Seminar.
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**September 2024 - Basic Education and Literacy Month**

- Conduct monthly board meeting.
- Participate in Assistant Governor Meeting.
- Promote attendance at the district meetings/trainings.
- Attend District Conference – Encourage all club members to attend.
- Monitor committee progress towards goals with club board members. Update Rotary Club Central.
- Nominate candidates to attend Rotary Leadership Institute.
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**October 2024 - 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)
- Conduct monthly board meeting.
- Participate in Assistant Governor Meeting.
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**November 2024 - Rotary Foundation Month**

- Conduct monthly board meeting.
- Participate in Assistant Governor Meeting.
- Confer with secretary to update the RI Membership database before 1 January so that the January semiannual report from Rotary International will be up-to-date and accurate.

- Monitor committee progress towards goals with club board members. Update Rotary Club Central.
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### December 2024– Disease Prevention and Treatment Month

- Conduct monthly board meeting.
- Participate in Assistant Governor Meeting.
- 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.
- December 31: Deadline for reporting next year's club president and secretary to DACdb and RI.
- Monitor committee progress towards goals with club board members. Update Rotary Club Central.
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### January 2025- Vocational Service Month

- Conduct monthly board meeting.
- Participate in Assistant Governor Meeting.
- Attend Pre-Presidents Elec Training Seminar/**Presidential Retreat**
- 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.
- Conduct club assembly to review club financial standing and progress toward all club goals
- Update goals and accomplishments in Club Central.
- Encourage members to help with RYLA (Rotary Youth Leadership Award) Camp
- Remind club about upcoming May 1 deadline for submitting applications for District Grants.
- Recruit club members to attend Grants Management Seminar (February and March).
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### February 2025– Peace and Conflict Prevention/Resolution Month

- Participate in Assistant Governor Meeting. Invite President Elect

- Conduct monthly board meeting.
- 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.
- February 23 (Rotary's anniversary) is World Understanding and Peace Day.
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### March 2025– Water, Sanitation and Hygiene Month

- Participate in Assistant Governor Meeting. Invite President Elect
- Conduct monthly board meeting.
- With President Elect and Finance Committee: finalize budget for next year, finalize Dues Statement to be sent to members.
- Make sure at least two club members have attended a Grant Management Seminar
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### April 2025– Maternal and Child Health Month

- Participate in Assistant Governor Meeting. Invite President Elect
- Conduct monthly board meeting.
- Encourage club members to participate in Giving Tuesday for the Rotary Foundation.
- Update goals in Club Central.
- May 1: Deadline to submit District Awards.
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### May 2025– Youth Service Month

- May 1: District Grant Project Complete Date – projects can finish earlier but not later than this date. Project Final Report is due if not already submitted.
- District Grant Application and MOU due to DACdb – **Due May 15**
- Conduct monthly board meeting. Invite incoming board members to attend.
- Participate in Assistant Governor Meeting. Invite President Elect.
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# Final Duties – Immediate Past President

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## July 2025 – June 2026

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 2025

Check with your club - The Immediate Past President may be responsible for duties such as training, convening and chairing the Nominating Committee, etc.

Other duties as assigned by the club:

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