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| This document is provided as a guide to assist you with preparing both before and during your year as president. It is a ‘living document’. Refer to the District Website (rotary6330.org) for the current version and other key documents. Also, please make any additions that reflect your Club’s plans, projects, and activities. See the District Calendar for key event dates. |
| **July** **Leadership Transition Month** | * Schedule regular Club Assemblies (normally 2-4 per Rotary Year)
* Confirm Club budget (as per Club procedure)
* Include Assistant Governor on your Club Bulletin recipient list
* Review and update Club Constitution and by-laws as required
* Discuss your Presidential Citation. Assign a Board member (ideally President-Elect) to monitor achievement in-year and provide progress at monthly board meetings.
* Prepare for District Governor visit (per guidelines). District Governor will meet with Board (prior to or following club meeting depending on timing) and address the Club. Arrange any hotel accommodation and meeting requirements and communicate with District Governor and Assistant Governor.
* Prepare for visits from Assistant Governor (AG will make one formal visit to the Club and attend a Board meeting). All other visits will be informal. Send invitations to the AG throughout the year for special events or celebrations or hands-on projects.
* Review Rotary Club Central and Club Runner on a regular basis with your secretary and make sure all data is recorded and up to date.
* Promote the Zone Conference
* On receiving District Grant Approval carryout and publicize the project. Must be completed by May 15th of your Presidential year
 |  | * **Create a My Rotary account on Rotary.org if you do not already have one.**
* **Prior to taking office complete the Club Secretary Basics courses in the RI Learning Center**
* **Present the RI and district dues invoices to the club treasurer for prompt payment.**
* **Make sure all officers are assigned in My Rotary.**

Monthly tasks* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | * **Create a My Rotary account on Rotary.org if you do not already have one.**
* **Prior to taking office complete the Club Treasurer Basics courses in the RI Learning Center**
* **Obtain necessary resolutions from the board to establish signatories on club bank account(s).**
* **Have the previous year’s financial results reviewed by a financial professional and present to the board and club for acceptance.**

Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).
* Replenish petty cash fund if your club has one.
 | * **Create a My Rotary account on Rotary.org if you do not already have one.**
* **Prior to taking office complete the Club Foundation Committee Basics courses in the RI Learning Center.**
* **Secure your committee members and establish meeting schedule, and format.**
* **Finalize committee’s budget.**
* **Work with your club’s board to establish goals, expectations and benchmarks for your committee’s work. Enter them in Club Central.**
* **Establish subcommittees, if needed to support your efforts.**
* **Review your club’s foundation giving history.**
* **Make sure all donors are promptly recognized and thanked. Ask the club secretary to order the appropriate recognition materials.**
* **Start the planning process to celebrate World Polio Day (October 24) and Rotary Foundation Month in November.**

Monthly tasks* Start a prospective donor list, review who may be close to the next level of recognition.
* Review any outstanding grant paperwork.(Global)
* **Recognition**
 | * **Create a My Rotary account on Rotary.org if you do not already have one.**
* **Prior to taking office complete the Club Membership Committee Basics courses in the RI Learning Center**
* **Secure your committee members and establish meeting schedule, and format.**
* **Finalize committee’s budget.**
* **Work with your club’s board to establish goals, expectations and benchmarks for your committee’s work. Enter them in Club Central.**
* **Establish subcommittees, if needed to support your efforts.**
* **Conduct a member satisfaction survey, share the results**.

Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **August** *Membership and New Club Development Month* | * Promote the Zone Conference
* Encourage membership growth and retention (on-going).
* Promote attendance at the Vibrant Club Seminars in October
* If your Club has opted to maintain membership attendance, please ensure the data is input into ClubRunner monthly
 |  | Monthly tasks* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | * **Pay the RI and district dues invoices when received.**

Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).
* Replenish petty cash fund if your club has one.
 | Check on status of District Grant | Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **September***Basic Education and Literacy Month* | * Zone Conference
* Review Rotary Club Central and ClubRunner on a regular basis with your secretary and make sure all data is recorded and updated to ensure it is kept current.
* Begin recruitment process for Long Term Outbound Youth Exchange students (if applicable)
* If your Club has opted to maintain membership attendance, please ensure the data is input into ClubRunner monthly.
 |  | * **Michigan clubs and club foundations that are incorporated must file their annual report with the state of Michigan by October 1**
* **If the club wants to propose a member to be governor-nominee candidate, send the resolution supporting the decision and completed district governor-nominee for to the district nominating committee.**

Monthly tasks* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).
* Replenish petty cash fund if your club has one.
 | Check plans for Polio Event in October | Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **October** *Economic and Community Development Month* | * Attend Vibrant Club Seminar
* Celebrate World Polio Day, October 24th
 |  | * Prepare support for annual club elections to be held before 12/31.
* Monthly tasks
* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).

□ Replenish petty cash fund if your club has one. | Carry out plans for World Polio Day and report fundraising amount.Inform Club on current world statistics for polio. | Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **November** *Rotary Foundation Month* | * □Review Rotary Club Central and ClubRunner on a regular basis with your secretary and make sure all data is recorded and updated to ensure it is kept current.
* Schedule a Club Meeting Educational Program on Rotary Foundation.
* Applications for outbound Long-Term Youth Exchange students are due to the district Youth Exchange committee.
* Encourage members to register for the RI Convention (**Registration costs usually increase in December**).
 |  | * Monthly tasks
* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | * **For US clubs and foundations with a fiscal year ending June 30 form 990 is due to the IRS by November 15**

Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).
* Replenish petty cash fund if your club has one.
 | Work with Program Coordinator for a speaker regarding the Foundation starting is Sept.Promote Foundation Goals for the year e.g. > Benefactors, EREY, utilizing PHF Points to recognize people, > member ‘s usage of My Rotary | Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **December** *Disease Prevention and Treatment Month* | * Conduct Club Elections for incoming Board for new Rotary Year.
* Ensure your Club’s membership data is up to date in the RI database – My Rotary [*Sign-in > Manage > Club Administration*] or via ClubRunner if integrated with RI – before January 1st, in preparation for January RI invoice #1. (Usually done by Club Secretary.) ***Please note you will be charged for all members listed so accurate reporting is critical.***
* Review Rotary Club Central and ClubRunner on a regular basis with your secretary and make sure all data is recorded and updated to ensure it is kept current.
* Consider planning a meeting/social to include the Family of Rotary
* Encourage members to register for the RI Convention
* Encourage Executive members to attend PETS
 |  | * **Ensure membership list is up to date and accurate by January 1st at the very latest.**

Monthly tasks* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | * **For Ontario incorporated clubs and foundations with a fiscal year ending June 30 form T-3010 is due to the CRA by December 31**

Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).

Replenish petty cash fund if your club has one. | Promote Giving Tuesday and end of the taxation year contributions to the Foundation | Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **January** *Vocational Service Month* | * **Ensure membership list is up to date and accurate (responsibility of Secretary) by January 1st at the very latest.**
* **Ensure RI Invoice #1 is processed (Responsibility of Treasurer).**
* Encourage Executive Members to attend PETS
* Review progress of club goals/Presidential Citation and district goals and discuss with Assistant Governor. Ensure that your Foundation donations are made as these are pre-requisites for qualification.
* Review Rotary Club Central and ClubRunner on a regular basis with your secretary and make sure all data is recorded and updated to ensure it is kept current
* Encourage members to register for the RI Convention
 | * **Create a My Rotary account on Rotary.org if you do not already have one.**
* **Complete the Club President Basics courses in the RI Learning Center**
* Confirm your in-coming Board (as per club’s December Election)
* Confirm/assign Avenue of Service with each Director (as appropriate/applicable)
* Consider Committee structure and potential Committee Chairs
* Enter club officers into the RI database – My Rotary [*Sign-in > Manage > Club Administration*] or via ClubRunner if integrated with RI. (Usually responsibility of Club Secretary.)

Consider applying for a District Grant by signing and submitting the MOU | * Report incoming club officers by February 1 on My Rotary
* Present the RI and district dues invoices to the club treasurer for prompt payment.
* Review the club’s schedule of activities with the president and the board of directors and prepare the midyear progress report.
* Monthly tasks
* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | **Prepare a mid-financial report and present to the club membership.**Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).

Replenish petty cash fund if your club has one. | Promote District Grant Qualification online course with at least 2 membersWork with the President-Elect to get the MOU signed and submitted | Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **February** *Peace and Conflict Prevention / Resolution Month* | * Encourage members to register for the RI Convention
* Encourage Executive members to attend PETS. Discuss progress for Presidential Citation (confirmation for achievement due to AG’s by June 15th to forward to DG in time for June 30th RI deadline)
* Review Rotary Club Central and ClubRunner on a regular basis with your secretary to ensure all data is recorded and updated to ensure it is kept current.
* Consider scheduling date for presidential changeover, especially if you are planning on inviting the DG, AG, or other guests, as schedules get very busy.
* RYLA Seminar for Tomorrows Leaders, Western University, London. Applications due to district RYLA chair.
* Support President Elect and in-coming board with planning process and goal setting
 | * Ensure your incoming club officers have been entered into RI database – My Rotary [*Sign-in > Manage > Club Administration*]or via ClubRunner by February 1st (Usually responsibility of Club Secretary
* Register for President-Elect training, - April, arrange your accommodation.*\*NOTE: As per Rotary International rules, attendance is mandatory. If you cannot attend the District 6330 training for reasons beyond your control, alternative arrangements for training must be made through consultation with the District Governor. \**Club Secretary)
* It is strongly recommended that your Secretary, Treasurer(s), Foundation and Membership Chairs, any interested members (i.e., future leaders) attend and Rotaractors

Meet with your in-coming Board to discuss your club’s goals and service activities for new year. Use the Rotary Club Central (RCC) Planning Worksheet to assist you with preparing the goals. Entry of your goals into RCC. | * Monthly tasks
* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).

Replenish petty cash fund if your club has one. | Prepare to celebrate Paul Harris Birthday Feb 23 | Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **March** *Water and Sanitation Month* | * Continue to encourage members to attend PETS/District Learning Assembly April
* Review Rotary Club Central and ClubRunner on a regular basis with your secretary to ensure all data is recorded and updated to ensure it is kept current.
* Continue promoting District Conference June
 | * Attend a Pre PETS meeting with your Assistant Governor (AG)
* Prepare for PETS by reviewing the information material on the President’s Corner of the District Website.
* Confirm registration for PETS and hotel accommodation
* Confirm Committee Chairs (and/or Co-Chairs) for the new Rotary Year
 | * **Confirm registration for district training assembly.**

Monthly tasks* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site.
 | *
 | * **Confirm registration for district training assembly.**

Remind members to become qualified for District GrantHas the MOU been submitted?Has a project been selected? | * **Confirm registration for district training assembly.**

Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **April** *Maternal and Child Health Month* | * Review progress of Club goals and discuss with assistant Governor
* Review Rotary Club Central and ClubRunner on a regular basis with your secretary and make sure all data is recorded and updated to ensure it is kept current
* Support President Elect and new board with planning process and goal
* Begin preparation for presidential changeover (as per club procedure)
* Encourage members to register for the RI Convention
* Continue promoting District Conference
 | * Slot your members into the various club committees per your club’s procedures; make sure all your members are engaged; complete by June 30th for a smooth transition into your year.
* Attend PETS
* Confirm the scheduled date for the District Governor official club visit and review the “DG Visit Guidelines”
* Advise the AG of significant club dates/celebrations/events so that the AG and/or District Governor can be aware in case your club would like to invite him/her to attend.
* Meet with your in-coming Board
* Start to plan the presidential changeover (as per club procedure)
* Promote the District Conference
 | * **If term is ending on June 30 begin leadership transition plan with successor**
* **Prepare credentials for delegates to the Rotary convention. (See RI By-laws 15.050 and appendix 3)**
* **Attend the district training assembly.**

Monthly tasks* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site
 | * **If term is ending on June 30 begin leadership transition plan with successor.**
* **Attend the district training assembly.**
* **Present next year’s budget to the board for approval.**

Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).

Replenish petty cash fund if your club has one. | * **If term is ending on June 30 begin leadership transition plan with successor**
* **Attend the district training assembly.**

**Are plans in place to recognize Paul Harris Fellows before the end of the Rotary Year? Are there Community Members who the Club can recognize?** | * **If term is ending on June 30 begin leadership transition plan with successor.**
* **Attend the district training assembly.**

Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **May***Youth Service Month* | * Review Rotary Club Central and ClubRunner on a regular basis with your secretary and make sure all data is recorded and updated to ensure it is kept current
* Prepare for Change-Over Meeting with in-coming President, Year-end concluding remarks and acknowledgement of Board, Chairs, Members (especially those Directors and Chairs not continuing in the current roles)
* Continue promoting District Conference
* Ensure completion report for District Grant submitted
 | * Discuss with your Board what you expect of them throughout the year – set parameters. Introduce the Year’s Theme – give out pins. Discuss working as a team. Communication is important – keep it open. Your first meeting is vital – it will set the tone for your year.
* Enter any outstanding Club’s Goals and Service Activities into Rotary Club Central– due May 15th.
* Prepare club budget for new Rotary Year.
* Arrange for a visit from your Assistant Governor with the purpose of introducing you as new club President and the RI Presidential Theme and Citation – and theme banner.

Promote the District Conference  | Monthly tasks* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site
 | * **Present next year’s budget to the club for approval.**

Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).
* Replenish petty cash fund if your club has one.
 | Is the District Grant project near completion? Final Report is due May 31.Has the proposal for the next year’s District Grant been submitted?Deadline is May 31 | Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |
| **June***Rotary Fellowships Month* | * Presidential Citation – deadline: June 30th
* Host a joint meeting with the up-coming Board and help prepare new Board members to new positions. Educate them on the “how to” and the importance of reporting to RI and District via Rotary Club Central and ClubRunner
* Ensure your Club’s membership data is up in the RI database – My Rotary [*Sign-in > Manage > Club Administration*] or via ClubRunner if integrated with RI – before July 1st, in preparation for July RI invoice #2. (Usually done by Club Secretary.) ***Please note you will be charged for all members listed so accurate reporting is critical***
* Review Rotary Club Central and ClubRunner on a regular basis with your secretary and make sure all data is recorded and updated to ensure it is kept current
* Attend the RI Convention
* Attend District Conference
* Changeover Meeting/Event: End of June or beginning of July (as Club protocol)
 | * Ensure your Club’s membership data is up in the RI database – My Rotary [*Sign-in > Manage > Club Administration*] or via ClubRunner if integrated with RI – before July 1st, in preparation for July RI invoice #2. (Usually done by Club Secretary.) ***Please note you will be charged for all members listed so accurate reporting is critical.***
* RI Convention
* Changeover Meeting/Event: End of June or beginning of July (as Club protocol)
 | * **Attend the district conference.**
* **Confirm that your club’s membership list is up to date**

**so, the July club invoices will be correct*** **Prepare your annual report to the club**

**.*** **If your term ends June 30 give the club’s records, materials, and archive to the incoming secretary.**

Monthly tasks* Prepare monthly meeting notices, agendas and distribute meeting minutes for approval.
* Review Rotary Club Central and Club Runner on a regular basis with your president and make sure all data is recorded and up to date.
* Answer all club incoming correspondence in a timely manner
* Produce outgoing club correspondence and communications in a timely fashion
* Support club committees with logistical and material support.
* Support club bulletin, website, and social media platforms.
* Record club meeting attendance on the district ClubRunner site
 | **Attend the district conference.**Monthly tasks* Regularly deposit cash and checks/cheques to the club’s bank account(s).
* Present invoices to the board for payment approval.
* Prepare checks/cheques for dual signatures and remit to vendors,
* Prepare comparative financial statements for each board meeting. Ideally comparing this year’s actual to budget and last year’s actual.
* Share outstanding member dues receivables with the board each month. Prepare member dues invoices based on your club’s billing cycle.
* Oversee the bank reconciliation(s).
* Replenish petty cash fund if your club has one.
 | * **Attend the district conference.**
 | * **Attend the district conference.**

Monthly tasks* Start a prospective member list, review vacant classifications. Share the list with club.
* Start making plans for Rotary’s Membership Month

(August). Encourage guests at events, projects, or social activities throughout the year.* Follow up on membership leads from Rotary International.
* Provide a meaningful induction ceremony. Assign a mentor to the new Rotarian and get them fully engaged.
 |

**NOTE:**

1. The District Leadership Team meets bi-monthly and you may receive a request prior to each of these meetings from your assistant governor for a club update
2. Conduct monthly Board Meetings
3. Ensure all your events and activities are promoted in local, social media and the District calendar as appropriate
4. Please submit all club news for publication to the Bridge monthly newsletter by the 25th of each month
5. You can expand your outreach to the public by sharing information on the District Facebook page
6. Encourage you club members to like and share your social media channels and the District Facebook page