

## Routine Planning and Review Checklist

Month	Stake / Ward Plans	Stake/Ward Clerk	Membership Assistant	Financial Assistant	Statistical Assistant	Historical Assistant	Technology Assistant
Jan	Annual Theme Unit Conference Plan Review Unit goals Establish Unit focus for year Special Projects	Ensure Calendar in place Record important dates Schedule Training for year Gather indicators for year (as needed)	Class Attendance Roll - Q1	Audit (July - Dec) Publish Budget to Council Ensure signing authority up-to-date	Submit Q4 report by Jan 15 Submit Rescue Initiative	Begin compiling Unit history from last year	Equipment Audit
Feb			Maintain records	Maintenance of Payees			
Mar	Facilities Review - prepare for June	PPI with assistants	Maintain records		Gather Rescue Initiative numbers Gather Quarterly Report numbers	Submit Unit History to Stake	
Apr		Review Quarterly report with Leadership	Class Attendance Roll - Q2		Submit Q1 report by Apr 15 Submit Rescue Initiative		
May			Maintain records				
June		Review budget	Membership Audit due June 30	Review budget Publish Budget Actuals to Council Prepare for Audit (Jan - Jun)	Gather Rescue Initiative numbers Gather Quarterly Report numbers		
July	Review Goals	PPI with assistants Review Quarterly report with Leadership	Class Attendance Roll - Q3	Audit (Jan - Jun)	Submit Q2 report by July 15 Submit Rescue Initiative		Equipment Audit
Aug			Maintain records	Maintenance of Payees			
Sep			Maintain records		Gather Rescue Initiative numbers Gather Quarterly Report numbers		
Oct		PPI with assistants Review Quarterly report with Leadership	Class Attendance Roll - Q4		Submit Q3 report by Oct 15 Submit Rescue Initiative		
Nov	Begin Budget planning Begin Calendar planning	Begin Budget planning	Maintain records	Begin Budget planning Review Budget Line Items Publish Budget Actuals to Council			
Dec	Solidify Calendar Review Budget	Balance the Missionary Account Tithing Settlement	Maintain records	Balance the Missionary Account Tithing Settlement  Prepare for Audit (Jan - Jun)	Gather Rescue Initiative numbers Gather Quarterly Report numbers	Gather any last history items	