

PRESIDENTS-ELECT PLANNING CALENDAR FOR DISTRICT 7790 CLUB PRESIDENTS

This Planning Calendar is to help you prepare for your year as President. It is based on the experience of many Past Club Presidents and Past District Governors. It is meant to be helpful in your planning, not to change your own style and approach - but for you to tailor it to meet your Club situation and your personal style. Likewise, please share your input based on your experience this year so the calendar will be even more helpful to your successor next year.

It is important that some of your planning activities be coordinated with your current Club President. During your year, you will not want members unduly distracted from tasks they agreed to do for you. Naturally, you will want to extend that same courtesy to your current President, and carefully consider any appointments, plans and decisions that may tend to interfere with his/her activities. When in doubt, ask. Your close cooperation with your Club President will make your planning and preparation more efficient. Be your Club President's biggest supporter and aide, and your successor will do the same for you!

Some of the following tasks you may have already started:

Meet with your Club President

- Offer your help during his/her year, and clarify what he or she wants you to do.
- Offer to be responsible for the District awards tally worksheet. This is an excellent tool to familiarize yourself with all Avenues of Service and to acquaint you with all club activities.
- Explain your plans and schedule and get his/her support. Make whatever adjustments to your schedule that the Club President suggested (you'll want your successor to do the same!).
- Success builds on success, so the more you help your Club President, the more successful your year as President can be.

1. The District Governor and your Assistant Governor will be periodically asking for your input. Make sure that the addresses, telephone, fax numbers and email addresses that he/she needs to communicate with you and the Secretary (when chosen) are available.

2. Set up at least 4 Files, or more:

- **IDEAS** - What to do/not do as President; what's good/bad about your Club; what's good/bad about other Clubs; what you can do in your Club that's new; how you can improve your Club; what you can do to increase your communication, public speaking, leadership and motivational skills; and anything else that comes to mind. It's amazing how much more you learn in visiting other Clubs and in talking with other Rotarians if you are already thinking about issues that may affect you.
- **QUESTIONS** -- what you don't know; what you want to know.
- **COMMITTEE CHAIRS** -- prepare your Club's organizational chart with spaces for your selections to fill the positions. If you don't have an organizational chart, make one! There is a sample organization chart ("Committee Plan for a Rotary Club") taken from the Club President's Workbook (distributed at PETS or before) which you may use. Obtain a copy from your current President.
- **ARTICLES** - Many Presidents write a weekly message in their Club bulletin; start collecting articles/ideas now so it won't be difficult to write a couple of paragraphs each week. Collect articles from other Club bulletins, magazines and other sources that you can not only use yourself, but can also give your Bulletin Editor as filler during your year. As thoughts come to you over the next many months, jot them down on slips of paper and drop them (or articles) into the files. In January, you can start putting the contents of the files in order.

3. Consider Picking Advisors. Ask 2 (or any number you wish) Past Club Presidents whose judgment you respect to be your "advisors." Meet with them periodically from now on to discuss the Club and your plans. Get honest feedback on your strengths and weaknesses.

4. Plan Your Communications. Plan to have a computer, FAX, and Club e-mail address by January. You may be asked by your District Governor elect to attend a Pre-PETS meeting with the other Presidents elect in your

area. This will be an opportunity for us to meet in an open, relatively informal, one day forum. It is important you attend. If applicable, your AG will advise you once the date and location has been confirmed.

5. With your Club President's approval, plan to attend as many Club Committee meetings as you can during the year. This helps you judge who to select as Chairs and how to improve the work of each committee.

6. Begin increasing your knowledge about Rotary and current developments.

- Visit the Rotary International Website at www.rotary.org. There is an incredible amount of information about Rotary's organization, programs, resources, where clubs meet, training and much more.
- Check our District Website. www.rotary-7790.org
- The Rotary Newsroom provides weekly information on worldwide Rotary activities on the Internet. Go to RI's home page at www.rotary.org, and click on "Newsroom" in the blue bar immediately under the Rotary International heading at the top of the page. That will take you to all the latest news in the Rotary world, and more.

7. Begin thinking about the goals you want to accomplish.

- What's important/of interest to you? Talk to people about them. You generate ideas and enthusiasm from others by letting them know your goals/interests.
- Keep the "BIG PICTURE" in mind! Dream! Be creative! Don't be afraid to consider things that have never been done before.

8. Begin a calendar of events for your year. Begin tentatively filling in events and activities (fundraisers, dinners, District activities, community events/projects, etc.) that you may want your club to hold. Continue filling in this tentative calendar throughout the year as you plan.

THINGS YOU SHOULD DO

9. Visit Clubs of all sizes. It's fun, and you'll be amazed at the ideas you pick up. SUGGESTION: Keep visiting other Clubs during your year - you'll be even more attentive to ideas that may help you.

10. Personally meet each new member of your Club. Some may be ideal Chairs, or persons to be in charge of projects/events, during your year.

Here is a calendar of events

OCTOBER

10. Offer to assist your Club President and Rotary Foundation Chair with plans for Rotary Foundation Month (November) activities.

11. Attend other Rotary Club meetings. Meet your Club's new members.

NOVEMBER

12. Review your Committee Chairs file and continue to fill in your organizational chart with your tentative selections.

13. Participate in your Club's Rotary Foundation Month activity and/or the District event(s).

14. Attend other Rotary Club meetings. Meet your Club's new members.

DECEMBER

15. Attend other Rotary Club meetings. Meet your Club's new members.

16. If you can, plan to attend the RI International Convention in June. Register on-line at www.rotary.org.

JANUARY

IT'S ONLY 6 MONTHS UNTIL YOU BECOME YOUR CLUB'S PRESIDENT!!

BE SURE TO ATTEND YOUR AREA PRESIDENTS MEETINGS WITH THE OTHER AREA PRESIDENTS. YOUR AG WILL ADVISE YOU OF THE DATE AND LOCATION

17. Activate your communications. If not already done, activate your computer, FAX and e-mail address.

18. Review your Committee Chairs file and firm up your tentative selections for your key team members. In many clubs, directors and some committee chairs are the same, but it is still important to make good decisions as to which chair to assign specific directors.

19. Decide exactly WHAT you want each Committee Chair to do -- be specific! A person must know exactly what you want him/her to do or accomplish in order to do a good job for you. Although the RI materials you will receive at PETS can be a guideline (and your President can share copies from last year's PETS for your

use), you should determine specifically how you want the job done in your club.

20. Begin selecting your team. Some Presidents select their team in December or January when club officers are reported to RI; others delay until February or March. Either way, don't ask someone to serve in a key position until after you meet with them and explain specifically what you want them to do (and get feedback and ideas from them): When people say "yes" to you, it should be a personal commitment to you to carry out some specified responsibilities that you have discussed -- it should not be merely an agreement to occupy a position. SUGGESTION: Don't coax anyone to take a job if they are really and truly reluctant and may not be able to carry through; it's better to have someone say "no" than to say "yes" and do nothing! REMINDER: Communicate and coordinate with your President, especially if you make early selections of people currently serving in key positions, so you are not perceived as undercutting the President by diverting people away from existing responsibilities.

21. Give information about your successor to the District (Club elections should have been completed by now). Ensure that the Secretary of your club provides the necessary information on-line at www.rotary-7790.org about your successor i.e. name, partner, address, phones, FAX, e-mail, etc.).

22. Attend other Rotary Club meetings. Meet your Club's new members.

FEBRUARY

23. Meet with your Club Treasurer and begin to prepare the Club Budget for your year. Obtain copies of the past 3 years' Club Budgets and financial statements. Discuss the particulars, especially shortfalls that occurred in past years. The Budget should be program-driven: Consider what you plan to do, figure the cost, and then construct your budget. Include sufficient funds for all programs, including new ones you plan to introduce, as well as District events (e.g., many Clubs pay for Club Officers, Chairs and members to attend the District Assembly training as well as District Conference).

NOTE: Many Club budgets rely heavily on "fines" or "recognition fees." Some Presidents are good at it, and some are not. Consider how you will stay on track to collect the amounts that you have budgeted. You may want to assign this task to another member.

24. Meet with your year's Board of Directors and begin discussing:

- **Planning Guide for Effective Rotary Clubs:** Begin filling out this form. Your club secretary should have last year's copy for you to work from. You will discuss the form at PETS, and you will be told when it is due. Due date is subject to change annually with each new District Governor.
- **Membership and EREY Goals.** At PETS, you will likely be asked to submit numbers for the amount of net new members you plan to bring in during your year as well as the per capita giving amount to the Rotary Foundation Annual Fund through Every Rotarian Every Year. MEET WITH YOUR BOARD TO DEVELOP THESE AMOUNTS! They will be instrumental in helping you meet these goals for the year.
- **The status of your Club and your plans for your year.** Remember others worked hard to get the Club to where it is, so be sensitive to feelings when you review past problems and plan changes.
- **Plans for Club Assemblies** in April or May (if one is to be held - to get Club membership input for your year) and in July (to present your plans to the entire Club).

26. Attend other Rotary Club meetings. Meet your Club's new members.

MARCH

IT IS MANDATORY THAT YOU ATTEND PETS [PRESIDENTS ELECT TRAINING SEMINAR]. The registration form for PETS will be on-line at www.rotary-7790.org by January if not sooner. Copies will also be emailed to every club. Here you will meet with over 50 Presidents elect from around District! Meet the District Governor for your year. Network, learn and have fun!

27. If you have not already done so, finalize your Club Organizational Chart by completing the selections of your Committee Chairs and other key Club positions.

29. Help your President promote attendance at the District Conference. Keep checking online for updates and registration. Typically, discounts are offered for early registration. Among other things, District Conference celebrates district and club activities -- including your Club and your President's year. The District Conference is for all Rotarians and their partners, not just club leaders. Bring all of your team members to the Conference.

Get them charged-up about Rotary programs and about implementing your year with enthusiasm!

30. Attend other Rotary Club meetings. Meet your Club's new members.

APRIL

30. Continue meeting with your Board of Directors.

31. Planning Guide for Effective Rotary Clubs: Complete this form and send a copy to your Assistant Governor by the time noted at PETS!

MAY

32. District Conference. Continue to promote the Conference so that as many members of your club attend this Celebration of our many successes. Your District Governor and his committee have been working long and hard to make the Conference a success - FOR YOU AND YOUR CLUB MEMBERS.

33. Meet with your Club Secretary. Ensure a free flow of information within the Club and with the District/RI. Your Secretary is your key communicator who can save you time and energy!

34. Confer with all your Committee Chairs. Have each begin to prepare a written plan for his/her Committee for the year. These will be presented at your July Club Assembly.

35. Continue meeting with your year's Board to prepare plans for your year. SUGGESTION: Hold a Club Assembly (with your President's approval) to discuss ideas for your year with Club members. Some Clubs use questionnaires to gather input from members; it can also be helpful to allow members to discuss what they want to do during your year.

36. Attend other Rotary Club meetings. Meet your Club's new members.

JUNE

37. Attend other Rotary Club meetings. Meet your Club's new members.

38. Continue meeting with your year's board to prepare plans for your year. SUGGESTION: Consider needed changes to your meeting room which may symbolize the beginning of your year (upgrade lectern, repair flags).

39. Plan July Club Assembly. Plan a Club Assembly in July to present your team and your plans to the entire club membership.

40. Make final arrangements for your year as President.

JULY 1st

Congratulations! You are on your way to becoming the BEST Club President your club has ever experienced. Why? Because you are going to have fun and you are going to make your meetings so entertaining that your fellow club members won't be able to wait to come back for the next week's meeting!