



PLANNING CALENDAR

President Elect Nominee Reverse Planning Calendar For 2014-2015 Club Presidents

Loretta Butts, District 5240 Governor 2014-15

This **Reverse Planning Calendar** is to help you prepare for your year as President of your club. 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---just 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 success for next year.

It is important that some of your planning activities be coordinated with your current Club President and President Elect. 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 effective. Be your Club President's biggest supporter and your successor will likely do the same for you.

AS PRESIDENT ELECT NOMINEE

April 2013

- **Register and attend the District Assembly in Bakersfield on April 6, 2013 or in Oxnard on April 13, 2013.**
- **Register for Member Access**
- **Register for PRLS and Master PRLS classes now!** If you are not already a Master PRLS graduate, consider becoming one. You will learn skills that will help you in your year as club president and interact with Rotarians from all over the district who will exchange ideas with you. Classes are booking up fast! Go to this link for further information and registration, www.rotarydistrict5240.org You will be asked many times during your Rotary year to encourage your members to attend PRLS and Master PRLS. If you are not a PRLS or Master PRLS graduate, it is more difficult for you to ask others to attend.



- Suggest that your Club President, President- Elect and yourself begin holding monthly meetings to help solve current problems and to ensure continuity of club programs. You will be surprised how a seamless transition will help to make your year more successful.
- Ask your club's sitting President and Membership Chair if you can become involved on the Membership Committee. The Ignite Initiative will continue into your year. Make sure that your club is participating. Familiarize yourself with the Membership process. What can be changed to make it better? Do you have an adequate Orientation, Rotary Information and Mentoring Programs? What are the Club membership goals and are they being met? How is your retention rate and how might the Club improve it.
- Familiarize yourself with both the District's and Rotary International's website pages. See what they have to offer: www.rotarydistrict5240.org & www.rotary.org.

MAY 2013

- Registration Packets will be mailed to you for the **President Elect and Partners Retreat**. This will be held on Friday, Saturday & Sunday, September 13-15, 2013 at the beautiful Seacrest Oceanfront Hotel in Pismo Beach, CA. Please send in your Registration early. It is suggested that your attendance at this retreat be a club expense.
- **Meet with your INCOMING Club President** as soon as possible.
 - * Offer your help during his/her year and clarify what he or she wants you to do. In many clubs, Presidents Elect have specific responsibilities.
 - * Offer to work with the club member responsible for the District Awards worksheet for your President. This is an excellent tool which will help you familiarize yourself with all Avenues of Service and to acquaint you with all club activities.
 - * Explain your plans and schedule (i.e., the contents of this Planning Calendar) and get the support of the incoming president. Make whatever adjustments to your schedule he/she suggests. (You'll want your successor to do the same!).
 - * Success builds on success! The more you help your Club President the more successful your year as president can be.

JUNE 2013

- Don't delay sending in your **President Elect Retreat Form today for both you and your Rotary Partner**. See you at Seacrest on September 13.



- Begin selecting your team by talking to people who you would like to serve with you. Try to have a mix of seasoned Rotarians and recent members. Consider multiple year appointments to ensure continuity for critical projects.

JULY 2013

- **Provide your Governor and District Secretary the most updated personal contact information.** Your Governor will be periodically asking for your input and sending you important Rotary International and District information. Make sure she has the information she needs to communicate with you and your Club Secretary (when chosen). Also, put your Governor, Executive Assistant Governor and Assistant Governor on your Club bulletin e-mailing list.
- **Set up at least four files:**

1. IDEAS

- What to do/not to 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.
- If you are already thinking about issues that may affect you during your year, you'll see how important it is that you visit other Clubs and talk with other Rotarians.

2. Questions

- What you don't know!
- What you want to know!
- What you need to know!
- How you will get the answers?

3. Committee Chairs

- Prepare you Clubs 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 chart ("Committee Plan For A Rotary Club") taken from the Club President's Workbook (distributed at PETS) which you may use. Your sitting President has a copy or you can get one from Rotary International.

4. Articles



- Many Presidents write a weekly message in their Club bulletins. 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 you can also give your Bulletin Editor as filler during your year. Another source of articles is the compendium of ideas written by others.
- As thoughts come to you over the next few months, record them where you can find them when you want to. In January, you can start putting the contents of the files in order.
- **Consider Picking Advisors.** Ask at least two Past Club Presidents whose judgments 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. Summarize in writing in your "Ideas" folder what's said at every meeting.
- **Plan Your Communications.** Plan to have a computerized club address and e-mail list by January 2014. Try to get all members to use e-mail communications. Investigate the possibility of having the Club Bulletin distributed electronically. In some clubs, the financial savings in stamps and printing over a year can amount to an extra Paul Harris Fellowship awarded to one of your staunch supporters after your year is over.
- **With your Club President's approval, plan to attend as many Club Committee meetings as you can.** This helps you judge whom to select as Chairs during your year and how to improve the work of each committee.
- **Begin increasing your knowledge about Rotary and current developments.**
 - (1) Your President receives three copies of Rotary World (5 issues per year). Ask the President to route one copy to you.
 - (2) Check District 5240 website at www.rotarydistrict5240.org and the Rotary International website Media and News Link at www.rotary.org.
- **Begin thinking about the goals you want to accomplish.**
 - (1) What is important or of interest to you? Talk to people about your possible plans. Generate ideas and enthusiasm from others by letting them know your goals/ interests.



- (2) Involve yourself in your club's Public Relations activities so that you can learn how your club communicates with others. Use the resources of the District Communications chair to help with your communication plans.
- (3) Keep the "Big Picture" in mind! Dream! Be creative! Don't be afraid to consider things that have never been done before. Don't be afraid to get rid of what's not working during your year.

- **Begin a calendar of events for your year.** Begin filling in tentative events and activities (fund-raisers, dinners, District activities, community events/projects, etc. that you may want your Club to hold, sponsor or participate in during the year. This keeps you thinking and helps avoid conflicts. Continue filling in this tentative calendar throughout the year as you plan. To get started, there is a District calendar on the District's website and there is a listing of Club Events.
- **Ensure that District training events are included on your calendar.** Plan to attend the seminars, programs and other training opportunities made available to you.

AUGUST 2013

- **Attend meetings of other Rotary Clubs.** Do this every month from now on. Observe everything (room set-up, greeting, fellowship, music, President's performance, etc.), make notes and put them in your ideas file. Be sure to 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.
- **Attend one of the District Membership Seminars.**
- **Personally meet each new member of your club.** Some may be ideal committee chairs or persons to be in charge of projects or events during your year.
- **Plan to attend** the District Conference this year. After all, it is a celebration of our District.
- **Send in your Registration** for the 2014 Rotary International Convention to be held in Sydney, Australia. More information to follow.

SEPTEMBER 2013

- Begin asking individual Club members for their ideas and interests. Start asking all Club members individually what they personally like about Rotary, what they would like to do and what they are interested in. You'll get important feedback and ideas and be able to access each person's interest/commitment better. You may be surprised at some of the responses! Some may have interests you didn't expect. You will discover people who are interested in working but simply have not been asked. It's probable that the members will be motivated because you took the time to talk to them individually. You won't know if you don't ask! Continue doing this until you have talked to every Club member.



- **Attend other Rotary Club meetings.** Meet your Club's new members. Promote PRLS/Master PRLS.
- **You and your partner attend Presidents Elect Retreat September 13-15.** This is an opportunity for all to get to know each other better and, with District Staff, to start planning the year together as Rotary leaders. This will also give you a chance to meet many other Club Presidents.

At the PE Retreat we will complete the READY stage for your year as Club President and help you get SET through your participation in Mid-Terms, PETS and next year's District Assembly