

## NOVEMBER 2013

- **Make sure you register for PETS** -- <http://www.socalnevadapets.org/> Friday morning elective courses are filling up fast. Make sure you get into the ones you want.
- **Confirm your 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 responsibilities to assign to specific Directors.
  - Think about what you will expect from each Committee Chair. A person must know exactly what you want him/her to do or accomplish.
  - Put your team in place. Meet with the people you would like to serve in your key positions. Share your ideas but also listen. Get feedback and ideas from them. When people say “yes” to you, it should be a personal commitment to you to carry out some specific responsibilities that you have discussed. It should not be merely an agreement to occupy a position.
  - REMINDER: Communicate and coordinate with your President, especially if you make selections of people currently serving in key positions, so you are not perceived as undercutting the President by diverting people away from existing responsibilities.
- **Once your club selects your successor** (Club President for Rotary Year 2015-16), make sure that information is provided to the District. Ensure that both the District Secretary and the District Administrative Aide, Nancy Falconer, have the necessary information about your successor (i.e., name, spouse, address, phone, cell phone, fax, e-mail, etc.).
- **Spend one-on-one time with your Club’s new members.**
- **Promote PRLS/Master PRLS. Remember that the PRLS instructors are willing to come to you with the program given enough interest.**
- **Follow the guidance provided by the emails on President’s Readiness Education Program (PREP).** Ensure that you are prepared for the District 5240 Mid-Terms in January and PETS in February.
- **Participate in your Club’s selection of Officers and Directors** in accordance with your Club’s By-Laws and Continuing Resolutions.

## DECEMBER 2013

- **Election of new Officers and Directors of your club. IMPORTANT:** Your Club Secretary must report the names and other pertinent information about the new officers and directors to Rotary International by December 31<sup>st</sup>. (Form provided by Rotary International)

- **As soon as registration opens for the Mid-Term Seminars that will be held in January and February 2014, send in your registration forms. Encourage your club's current president and president-elect nominee to register with you.**
- **Enjoy the holiday season with your family and with the members of your Rotary family**

## **JANUARY 2014**

### **ONLY 6 MONTHS UNTIL YOU'RE THE CLUB PRESIDENT!!**

- **Attend Mid-Terms with your President and the newly elected President Elect Nominee.**
  - 01/04/14 Mid-Terms Inland Sheraton 4-Pts Bakersfield
  - 01/11/14 Mid-Terms South Coastal Marriott Courtyard Oxnard
  - 02/01/14 Mid-Terms North Coastal Santa Maria Radisson
- **Review the "Summary of Club Plans and Objectives".** *This form must be completed and submitted at least 2 weeks before PETS. Make extra copies and please bring a copy of this form to PETS in February/.*
- **Start planning your Events Calendar.** If you have a special request for the District Governor's attendance at one of your events, contact Dan Balfe at [danbalferotary@aol.com](mailto:danbalferotary@aol.com) to get it on her calendar. You will have a tentative date for the Governor's visit before PETS. You will have an opportunity to review the dates, exchange e-mails if necessary and finalize the dates at PETS.
- **Encourage Board Members and Club Leaders who have not attended PRLS** to consider both Basic PRLS and Master PRLS. This training will make for a stronger leadership team. Many clubs pay for attendance by their club members.
- **Make sure that your club is qualified to participate in District Grants and Global Grants.** You and at least one other member of your club must have attended the Grants Management Training Seminars. You and the President Elect Nominee must sign The Rotary Foundation Memorandum of Understanding and the District 5240 Addendum to the Memorandum of Understanding.
- **Work with current and RY 2014-15 leadership teams to determine how you want to use the District Designated Funds (DDF) made available to your club for District Grants.** The period of submission for District Grants is January 15, 2014 – March 31, 2014. These are grants that will be performed in RY 2014-15. If all DDF has not been committed by March 31<sup>st</sup>, one additional District Grant may be submitted from April 1 – April 30. DDF will then be awarded on a first come, first served basis until all DDF has been committed or until the submission deadline has passed. You can find more information on the District 5240 website: [www.rotarydistrict5240.org](http://www.rotarydistrict5240.org) Select Foundation then Select Grants. Look for 2014-15 District Grants.

## **FEBRUARY 2014**

- **Begin to prepare the Club Budget for your year.**
  - Meet with the current club treasurer and with the RY2014-15 club treasurer. If you have not already done so, obtain copies of past club budgets and financial statements. Discuss the particulars, especially any problems that have occurred in past years.
  - The Budget should be program-driven: Consider what you plan to do, figure the costs and include sufficient funds for all programs including new ones you plan to introduce. Ensure that commitments made on behalf of the club in prior years are reviewed and, as appropriate, accounted for in your budget. Include allocations for District programs such as the District Assembly and STEPS. Consider the possibility of sponsoring or assisting with costs so some of your members can attend other district events such as the District Conference if it would be financially difficult for them to attend otherwise. Remember, we want to bring value to membership.
- **Attend PETS.** Ensure that you have completed your PREP work in order to have a productive experience at PETS. PETS will be held at the LAX Marriott February 21-23, 2014. Hopefully, your spouse or partner will be able join you. It will be a time of fun, fellowship, learning and inspiration. *(It is the policy of Rotary International, and not the PETS Committee, that no one can serve as Club President without completing this training.)*
- **Continue meeting with members of your club.** The more you know about your club members the more you will be able to meet their needs and engage them in the club activities for your year. Invite club members to coffee and ask them what they would like to see next Rotary year. Get feedback on what is working well in the club and what could use some improvement. Talk to the club members about your preparation to serve as club president and the plans for your year as president. Be sure to include some of your newer members early on in the process.

## **MARCH 2014**

- **Finalize the selection of your team.** Complete your club Organizational Chart with key positions and committee assignments.
- **Meet with the RY 2014-15 Club Board of Directors:**
  - Begin team building. Learn about each other. This is the team that will be working with you in RY 2014-15. Consider holding a retreat in April with your entire team. Reach out to your district leadership for ideas or facilitation needs.

- Review and discuss the status of the Club and plans for the coming year. Make sure that you include commitments, plans and obligations from prior years.
- Review feedback from discussions with the members of your club. Meeting members' needs and ensuring that they have a meaningful experience will be one of your keys to success in RY 2014-15.
- Here is where your leadership really steps up - Inform your Board members and all members of your team about the District Assembly that will be held on March 29, 2014 (Coastal) and April 12, 2014 (Inland). Attendance should be mandatory for your Board members and Committee chairs. Make it a fun event by car pooling to get to know each other better and then plan to have lunch together after the Assembly.
- The more your members know about Rotary, the more they will get out of their membership. Ask your Club President to allow you time at each meeting to promote the District Assembly for your upcoming year. The District Assembly is for all Rotarians not just incoming club leaders. It can be especially beneficial for members who have been in the club for a year or less.
- **Meet with your Assistant Governor** and with the other Club Presidents in your group. The Assistant Governor for RY 2014-15 should begin meeting with you and your classmates by April. You will also meet the members of the District Leadership team in your region.
- **Meet monthly with your current club president and president-elect nominee** to ensure continuity of club programs and culture and to support a seamless transition to RY 2014-15

## **APRIL 2014**

- **Attend the District Assembly Training Sessions** with your team and club members. The key purpose of the District Assembly is to train your team members so they have more confidence in handling their responsibilities and so they know who their resources are within their Group, the Region, and at District levels. Ensure that ALL key personnel (Board Members, Officers, Committee Chairs and new Rotarians) with positions of responsibility attend at least one of the District Assembly sessions.
- **Hold a Retreat with your Board of Directors, Committee Chairs and other key members of your leadership team.** Have each prepare a written plan of action or outline for their individual areas of responsibility.
- **Attend other Rotary Club meetings** in your group. Get to know the club presidents with whom you will be serving in RY 2014-15

## **MAY 2014**

- **Continue meeting with your Board to finalize plans the year.** Review your proposed budget, plans for each committee, and your club's By Laws and Continuing Resolutions. Ensure that your By Laws have been updated to comply with the Rotary International 2013 Manual of Procedure.
- **Meet with your Club Secretary.** Ensure a free flow of information with the Club, District and Rotary International. Your Secretary is your key communicator who can save you time and energy!
- **Don't forget to give your successor a meaningful job.** Many clubs assign the President Elect a specific responsibility. If your club does not do this, find a key position in your organization to help them prepare for RY 2015-16. A successful transition is part of your responsibility as Club President.

## **JUNE 2014**

- **Attend the Rotary International Convention in Sydney, Australia May 31- June 4, 2014**
- **Continue meeting with your year's Board.** Consider any changes needed to your meeting room: upgrade the lectern, repair the flags, fix the sound equipment, survey the members about the food, service and location of the meeting.
- **Plan your first July meeting. You are the program. Define, Inspire and Empower!**  
You can plan a program introducing the leadership team, introducing the plans, objectives and projects for your year. This will be an opportunity to hand out your Rotary year calendar and current rosters and pass out information on the District Conference in Monterey in October and the Rotary International Convention in Sao Paulo, Brazil. This will be your first time as President to inspire and empower club members. It's your opportunity to start your year off with a bang. Interject some humor or entertainment in the meeting to keep it light and interesting. You have prepared yourself well and you have a great year planned for your members.
- **Attend the Outgoing Governor's Step-down and Club Awards Celebration on June 28, 2014** with the outgoing Club President and other members of your Club.

## **JULY 2014**

**Congratulations, President! It is time to enjoy and...Have Fun!**