



**DISTRICT 5240  
PLANING CALENDAR  
APRIL 2015 – SEPTEMBER 2015**

**REVERSE PLANNING CALENDAR**

**GETTING READY**

**March 2015 - September 2015**

**For 2016-17 Club Presidents**

**Nick Frankle, District 5240 Governor 2016-17**

This **Reverse Planning Calendar** will 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 a guide to help you with your planning. Tailor the recommendations in the calendar to meet your Club culture and your personal style. Please share your input based on your experience this year so the calendar will be more helpful to your successor in the following year.

It is important that some of your planning activities be coordinated with the current Club President and President Elect. During the year you will serve as club president, you will not want members unduly distracted from tasks they agreed to do for you. Please extend that same courtesy to your current President and President-Elect and carefully consider any appointments, plans and decisions that may tend to impact their 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.

**March/April 2015**

- **Register and attend the District Assembly in Bakersfield on March 21 or in Oxnard on March 28.**
- **Register for Rotary Club Central on the Rotary International website ([www.rotary.org](http://www.rotary.org)). Confirm that your personal information is correct. Review your club's goals and achievement so far.**
- **Obtain a login for the District 5240 website ([www.rotarydistrict5240.org](http://www.rotarydistrict5240.org)). Confirm that your personal information is correct.**
- **Plan to attend the Zone Membership Team New Focus Presentation on April 18 in Santa Barbara. Learn what is new and innovative in membership recruiting and retention. Membership will be a key area of focus in RY 2015-16 and in your year as club president RY 2016-17**
- **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. Graduates of Master PRLS often say that the relationships and friendships they made with Rotarians from all over the district was one of the most valuable benefits of the program.



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Classes are booking up fast! Go to this link for further information and registration, [www.rotarydistrict5240.org](http://www.rotarydistrict5240.org) – select Links then Select PRLS website. 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 you, the current Club President, and the club President- Elect begin holding monthly meetings to help discuss club status, identify and resolve any current problems and ensure continuity of club programs. Many programs including District grants and Global grants span Rotary years. You will be surprised how much a seamless transition will help to make your term as club president more successful. This is your opportunity to demonstrate your role as a champion of the club.
- Participate as a member of your club’s Membership Committee. Membership will be one of your key goals during your year as president. 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? Does your club membership represent your community? The district average for women in our clubs is 30%. How is your club doing?

**MAY 2015**

- **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 and how RI and the district will evaluate your club.
  - \* 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 2015**

- Register for the **President Elect Retreat for both you and your Rotary Partner**. The retreat will be held September 18-10 at the Oxnard Marriott.



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- **Meet the members of your club.** Learn about them not just as Rotarians but as people. What are their backgrounds? What are their interests? You never know who has a skill or a passion that will be of benefit to you in your year as president unless you ask.
- **Begin 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.
- **If you haven't already done so, make a donation to The Rotary Foundation.** You are a club leader and need to set an example for the members of your club. Consider becoming a member of the Paul Harris Society or a Benefactor or a member of the Bequest Society

## **JULY 2015**

- **Twelve months to go! Meet with the district leadership team (EAG, AG) who will be assisting you in your year as club president.**
- **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 as club president, 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?
- Who can help you? This is a good time to set up a "brain trust" of club past leaders that can serve as advisors during your year as club president. Meet with them periodically from now until the completion of your year as club president to discuss the Club and your plans. Get honest feedback on your strengths and weaknesses. Summarize in writing in your "Ideas" folder the key points from each meeting.

### **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



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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.
  - Review the resources available from RI. Visit the website. Sign up for monthly updates from RI that will contain information in areas that can help you as a club leader and as club president.
  
  - 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.
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- **Plan Your Communications.** Find out how club presidents communicate with the members of your club. In many cases, this communication may be through your club website. A phone call or face to face meeting are important tools in communicating with your members, especially with those that you think might be having challenges or who are candidates to serve with you in a club leadership position during your year as club president
  - **With your Club President's concurrence, 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.
  - **Continue to increase your knowledge about Rotary and current developments.** Check District 5240 website at [www.rotarydistrict5240.org](http://www.rotarydistrict5240.org) and the Rotary International website Media and News Link at [www.rotary.org](http://www.rotary.org).
  - **Begin thinking about the goals you want to accomplish.**
    - (1) Remember, the most important person in you club is the individual member. Use your communication with them to establish club goals.
    - (2) What is important or of interest to you? Talk to people about your possible plans.
    - (3) 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.



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(4) 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.
- **Plan to bring in a member** during your year as President-Elect. This is a great way to set an example to members of your club who you will be asking to help grow your club’s membership during your year as club president.
- **Meet with your successor as soon as he/she is chosen.** Involve them in your planning activities as both a learning experience and as a way to ensure a seamless transition at the end of your year as club president.

## AUGUST 2015

- **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 a District Membership Seminar.**
- **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.
- **Register for** the District Conference this year in Bakersfield October 2-4, 2015. It is a celebration of our District and chance to meet with your classmates from other parts of the district.
- **Send in your Registration** for the 2016 Rotary International Convention to be held in Seoul. More information to follow.
- **Prepare for the PE Retreat** by meeting with your treasurer to understand your club’s budget, review your club’s bylaws and continuing resolutions.
- **Inform Mark Furia, the District Schedule Coordinator,** of any special club events (fundraisers, recognition events, important club anniversaries) that you would like to have the District Governor attend during your year as club president



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**SEPTEMBER 2015**

- Continue 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.
- **You and your partner should attend Presidents Elect Retreat September 18-20.** 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**





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**IMPORTANT DATES**

- District Assembly
  - March 21, 2015: Bakersfield
  - March 28, 2015: Oxnard
- Zone Membership Team – New Focus
  - April 18, 2015 – Braille Institute Santa Barbara
- PE Retreat:
  - September 18-20, 2015 Oxnard Marriott
  - Partners Are Invited
- District Conference
  - October 2-4 Bakersfield, CA
- Midterms:
  - January 9, 2016 Bakersfield (AM)
  - January 30, 2016 Oxnard (AM)
  - January 30, 2016 Santa Maria (PM)
- RI President Peace Conference
  - January 15-16, 2015
  - Ontario, CA
  - Replaces STEPS for RY 2015-16
- PETS
  - February 19-21, 2016
  - LAX Marriott
  - Partners are invited
- District Assembly:
  - April 2, 2016 Bakersfield
  - April 16, 2016 Oxnard
- Rotary International Convention
  - Seoul, Korea
  - May 29-June 1, 2016
- Begin Your Year as Club President: July 1, 2016
- Our District Conference
  - October 14-16, 2016
  - Hyatt Westlake Village