**Rotary International - District 6270**

**Club President Elect (PE)**

**THE VITAL FEW**

**Key Activities - To Do Before you become Club President**

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| **What** | **When** | **Purpose** |
| **Who**: Finalize Club Leadership Team | March | Gain commitment to roles & responsibilities. |
| **What - Training**: Encourage Leadership Team to attend Spring Assembly / District Conference (get training) | April-May | Continue planning for the PE’s Leadership year – training the leadership team for the coming year (ensure understanding of roles / responsibilities). |
| **What**: Club – goals agreement. | April | Get buy-in from club leadership / board on goals for the coming year – membership, service, contributions, etc... Integrate with Presidential Citation. Due end of April. |
| **How Much:** Establish Club Annual Budget | April - June | Budget reflects priorities, goals, and what you will be able to do. |
| **Rules**: Review club By-Laws and Strategic Plan, | June | Develop action plan for your year as president. Continue planning. |

**Key Forms / Data - To Complete**

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| **Activity/Area** | **Purpose / Comment** | **Location** | **Due** |
| Club **Membership** Goals | Establish and Report the club’s membership goals for the coming year – e.g., attraction, engagement. | **RI Club Central website** | April - May |
| RI **Foundation** Club Goals | Establish and Report club plans for contributions to the RI foundation in the coming year. | **RI Club Central website** | April - May |
| Club **Service** Goals | Establish and Report on club plans for service for the coming year. | **RI Club Central website** | April - May |
| Continuing Support of Youth Protection Policy – **Rotary Club Statement of Compliance** | Submitted by all clubs participating in youth activities in any way. Completion is required by the U. S. State Department for Rotary District participation in youth activities. | Provided by District Youth Protection. | March PETS |
| **Presidential Citation** Planning | Plan actions to align Presidential Citation activities with Club Goals & Strategic Plan. Distributed at PETS | **RI website Dashboard** | April - June |

**Key District Meetings / Training - To prepare**

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| **What** | **When** | **Who** | **Purpose** |
| PETS Orientation | February | PE + PEN (optional) | Prepare for PETS – what to expect, what information is needed, District specifics. (Required for PE) |
| PETS (President Elect Training Seminar) | March | PE + PEN (optional) | Prepare PE for his/her year as president. What is expected? Guidance on club leadership. Lots of information about Rotary. (Required for PE) |
| Spring Assembly District Conference | April - June | PE + PEN + Leadership Team + Club Members | Continue training of the PE’s Leadership team for the coming year. Especially useful for new officers and board members. Learning about Rotary |
| Grant Management Seminar | varies | PE + Grant or Foundation Chair | Learn about grant process & requirements. Club attendance is required to apply for grants.” |
| Officer Training | varies | Club Secretary, Treasurer | Training on function and responsibilities of Club executives – e.g., Secretary, Treasurer. |