

**PRESIDENTS-ELECT PLANNING CALENDAR
FOR 2010-2011 CLUB PRESIDENTS (SoCal PETS)**

This Planning Calendar is to help you prepare for your year as President of your Club and 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 successor next year.

This will be your year to be entrusted with the stewardship of your Club. It's "your" year, but it's NOT "your" Club. You are actually part of a team of Presidents—those who precede you and those who succeed you. It is important that your planning activities be coordinated with your current Club President, and also with your successor. During your year as President, you'll not want members unduly distracted from tasks they agreed to do for you, so naturally, you'll 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 (and your successor) will make your planning and preparation more efficient. Be your Club President's (and successor's) biggest supporter and aide, and they will do the same for you!

JULY 2009 (and before)

1. Meet with your Club President as soon as possible.
 - Offer your help during his/her year, and clarify what (s)he 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 (i.e., the contents of this Planning Calendar) and get his/her support. Make whatever adjustments to your schedule that the Club President suggests (you'll want your successor to do the same!).
 - Success builds on success, so the more you help your Club President (and your successor in his/her planning), the more successful your year as President can be.

2. Give your Governor the contact information for you and your Club Secretary. Your Governor will be periodically asking for your input. Make sure he/she has the information he/she needs to communicate with you and the Secretary (when chosen). Also, put your Governor on your Club bulletin mailing list.

3. Set up at least 4 files (or more):
 - a. 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.
 - b. QUESTIONS -- what you don't know; what you want to know.
 - c. 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.
 - d. 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.
4. 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.
5. Plan Your Communications. Plan to have a computer, FAX, and Club e-mail address by January.
6. 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.

7. Begin increasing your knowledge about Rotary and current developments.
 - Visit the Rotary International Website at <http://www.rotary.org>. There is an incredible amount of information about Rotary's organization, programs, resources, where clubs meet, and much more.
 - Your President receives 3 copies of Rotary World (5 issues per year); ask the President to route one copy to you.
 - Check your District's Website.
8. 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.
9. 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, sponsor or participate in during your year. This keeps you thinking, and helps avoid conflicts. Continue filling in this tentative calendar throughout the year as you plan.

AUGUST 2009

1. Attend 1-2 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.
2. 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.

SEPTEMBER 2009

1. 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 better assess each person's interest/commitment. You may be surprised at some of the responses! Some may have interests that you didn't expect -- or are interested in working but simply have not been asked -- or might be motivated because you personally took the time to talk to them and ask

them. You won't know if you don't ask! Continue doing this until you have talked to every Club member.

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

OCTOBER 2009

1. Many Governors-Elect host a get-together for their Presidents and their Rotary Partner. If your Governor has such a get-together, by all means attend. This is an opportunity for all to get to know each other better and to start planning the year together as Rotary leaders. This will also give you a chance to meet many other Club Presidents.
2. Offer to assist your Club President and Rotary Foundation Chair with plans for Rotary Foundation Month (November) activities.
3. Attend other Rotary Club meetings. Meet your Club's new members.

NOVEMBER 2009

1. Review your Committee Chairs file and continue to fill in your organizational chart with your tentative selections.
2. Participate in your Club's Rotary Foundation Month activity and/or the District event(s).
3. Attend other Rotary Club meetings. Meet your Club's new members.

DECEMBER 2009

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

JANUARY 2010 IT'S ONLY 6 MONTHS UNTIL YOU BECOME YOUR CLUB'S PRESIDENT!!

1. Activate your communications. If not already done, activate your computer, FAX and e-mail address.
2. 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.
3. 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 R.I. 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.

4. Begin selecting your team. Some Presidents select their team in December or January; 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.
5. Give information about your successor to the District. Ensure that the District Secretary and DGND have the necessary information about your successor (e.g., name, spouse, address, phones, FAX, e-mail, etc.).
6. Attend other Rotary Club meetings. Meet your Club's new members.

FEBRUARY 2010

1. Meet with your Club Treasurer. Obtain copies of the past 3 years' Club Budgets and financial statements. Discuss the particulars, especially shortfalls that occurred in past years.
2. Begin to prepare the Club Budget for your year.
 - 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).
 - 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.
3. SUGGESTION: Ask your President to schedule a Club Assembly in April or May to allow you and your team to discuss ideas for your year and solicit input from the Club membership about what they want.
4. Attend other Rotary Club meetings. Meet your Club's new members.

5. Attend PETS at the LAX Marriott Hotel in Los Angeles, February 19-21, 2010. (**ABSOLUTE REQUIREMENT!!!**).
6. Planning Guide. Begin completing the form entitled "Planning Guide for Effective Rotary Clubs." Some districts distribute these early in the Rotary year and some as late as at PETS. Some districts gather the completed forms at PETS and others later in the Spring.

MARCH 2010

1. Select your team. 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.
2. Meet with your year's Board of Directors and begin discussing:
 - a. 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).
 - b. 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).
3. Inform your Board members and all members of your team of the District Assemblies that will be held.
4. Help your President promote the District Conference
 - Among other things, it 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!
5. Attend other Rotary Club meetings. Meet your Club's new members.

APRIL 2010

1. Continue meeting with your Board of Directors.
2. Help your President promote the District Conference.
3. Attend other Rotary Club meetings. Meet your Club's new members.

MAY 2010

1. District Conference. Attend with your entire team, and actively participate in, the District Conference.
2. District Assembly Training Sessions. (**ABSOLUTE REQUIREMENT!!!**) Attend. A key purpose of the District Assembly is to train your team members so they can do their jobs better. Ensure that ALL key personnel (Board Members, Officers, Committee Chairs and new Rotarians) you have selected for your year register with you and attend one of the District Assemblies.
3. Meet with your Club Secretary. Ensure a free flow of information within the Club and with the District/R.I. Your Secretary is your key communicator who can save you time and energy!
4. 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.
5. 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.
6. Attend other Rotary Club meetings. Meet your Club's new members.

JUNE 2010

1. Attend other Rotary Club meetings. Meet your Club's new members.
2. 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).
3. Plan July Club Assembly. Plan a Club Assembly in July to present your team and your plans to the entire Club membership.
4. Attend the R.I. Convention in Montreal, June 20-23, 2010.
5. Make final arrangements for your year as President.

JULY 2010 Congratulations, President! Go for it!