

## **2022-2023 PRESIDENT-ELECTS PLANNING CALENDAR**

This Planning Calendar is to help you prepare for your year–2023-2024– 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.

It is important that some of your planning activities be coordinated with your current Club President. Your close cooperation with your Club President will make your planning and preparation more efficient. Be your Club President's biggest supporter and aide, and your successor will do the same for you!

**Note: we strongly encourage you to complete the suggested training webinars and learning center courses assigned by or suggested by DGE Laine and at Pre-PETS workshops.**

### **JULY 2022:**

- Meet with your current Club President as soon as possible. Offer your help during his/her year, and clarify what (s)he wants you to do.
- Give DGE Laine and her COS Tony the contact information for you and your leadership team, once you establish it. Your leadership team might include a Club Secretary, Club Treasurer, Rotary Foundation Chair, Community Service Chair and International Service Chair. Also, put DGE Laine on your Club bulletin mailing list.
- Consider setting up at least 4 files (or more) to assist in preparation for your year as Club president:
  - IDEAS FILE -- 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.
  - QUESTIONS FILE -- what you don't know; and what you want to know.
  - COMMITTEE CHAIRS FILE-- 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 (available online in “My Rotary” for downloading) which you may use.

- ARTICLES FILE -- If your Club's weekly bulletin has a weekly message from its President, start collecting articles/ideas now so it won't be difficult to write a couple of paragraphs each week.
- 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.
- Another best practice is to establish a President's Advisory Council, consisting of your club's Immediate Past President, Current President, President-Elect and President Elect Nominee. This will help facilitate the orientation of future leaders and help your club maintain continuity of your strategic plan.
- With your Club President's approval, 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.
- Continue to increase your knowledge about Rotary and current developments. One way to do this is to periodically visit the Rotary International Website at <http://www.rotary.org>. Also, periodically check our District's Website <https://rotary5150.org> and Facebook page.
- 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.
- 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.

## **AUGUST 2022:**

- Start attending meetings of other Rotary Clubs and continue attending them during your PE year as often as you can. Observe everything (room set-up, greeting, fellowship, music, President's performance, etc.), make notes and put them in your Ideas file. Try to visit Clubs of all sizes.
- Try and 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.
- Attend the District President-Elects Social. This is an opportunity for all to get to know each other better and to start planning the year together as Rotary leaders.

## **SEPTEMBER 2022:**

- Begin, and for the balance of your PE year continue, as time permits, asking individual Club members for their ideas, interests, feedback and what they personally like about Rotary and/or your Club.

## OCTOBER 2022:

- **Attend Pre-PETS I** at Rotary Terrace, 310 Miller Avenue, South San Francisco on Saturday, October 15, 2022. Dress nicely for your President's photo.

## NOVEMBER 2022:

- Review your Committee Chairs file and continue to fill in your organizational chart with your tentative selections.
- Begin completing required tasks that make your club eligible to use your 2023-24 District Designated Funds.

## DECEMBER 2022:

- **IMPORTANT! If you have not already done so, complete the suggested webinars and learning center courses assigned to date by DGE Laine or at the Pre-PETS workshops.**
- **Ensure that you and your slate of officers have been inputted into Rotary Club Central for the 2023-24 year by your Club President or Secretary. It's the only way PEs have access to input your club goals and other data.**

## JANUARY 2023 (6 MONTHS UNTIL YOU BECOME YOUR CLUB'S PRESIDENT):

- **IMPORTANT:** If you have not done so already, complete your December tasks.
- Review your Committee Chairs file and firm up your tentative selections for your key team members. Decide exactly **WHAT** you want each Committee Chair to do -- be specific! Although the R.I. materials you will receive can be a guideline (and your President can share copies from last year's distribution for your use), you should determine specifically how you want the job done in your Club.
- 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).

SUGGESTION: Don't coax anyone to take a job if they are reluctant and/or 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.

- Give information about your successor (President Elect Nominee) to the District. Ensure that District Secretary Dora Dye and DGN Steve Wright have the necessary information about your successor (e.g., name, address, phones, email, etc.).

## FEBRUARY 2023:

- **IMPORTANT:** If you have not done so already, complete your December tasks.
- **Attend PRE-PETS II** at Rotary Terrace, 310 Miller Avenue, South San Francisco on Saturday, February 11, 2023 in the morning. If you haven't already had your President's photo taken, then do so. Dress nicely!
- **Attend District Grants Management Training** at 310 Miller Avenue, Rotary Terrace, South San Francisco on Saturday, February 11, 2023 in the afternoon. One other member of your Club must also attend this training.
- Meet with your Club Treasurer. Begin to prepare the Club Budget for your year.
- **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.

## MARCH 2023:

- **Attend Far West PETS** on March 3-5, 2023 at the Doubletree Hotel in San Jose.  
**ABSOLUTE REQUIREMENT: You are required to attend 2023 PETS (even if you are a Past President) before you are qualified to serve as the next club president. If you are unable to attend during these dates, you must contact your District Governor immediately.**
- 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.
- If you didn't attend the February 11, 2023 training, **attend District Grants Management Training** on Saturday, March 11, 2023. One other member of your Club must also attend this training.
- **Attend the District Learning & Development Assembly** on March 25, 2023 at Redwood High School, 395 Doherty Drive, Larkspur. 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 and

attend the District Assembly. After the District Assembly, hold a meeting with the members of your club who attended the Assembly to debrief what they learned.

- Meet with your year's Board of Directors and begin discussing:
  - The status of your Club and your plans for your year.
  - Plans for Club Assemblies in April or May (if one is held—to get Club membership input for your year) and in June (if one is held—to present your plans to the entire Club).
- Help your President promote the 2023 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. Encourage all of your team members to attend the Conference. Get them charged-up about Rotary programs and about implementing your year with enthusiasm!

## **APRIL 2023:**

- Continue meeting with your Board of Directors.
- Work on your 2023-24 Club plans and objectives. Enter goals in Rotary Club Central.
- SUGGESTION: Hold a Club Assembly (with your President's approval) to discuss ideas for your year with Club members.

## **MAY 2023:**

- Attend the District Conference. Attend with your entire team, and actively participate in the District Conference.
- Meet with your Club Secretary. Ensure a free flow of information within the Club and with the District/R.I.
- Confer with all your Committee Chairs. Have each begin to prepare a written plan for his/her Committee for the year.
- Continue meeting with your year's Board to prepare plans for your year.
- Attend the Rotary International Convention in Melbourne, Australia June 12 - June 16, 2023. The convention is incredibly valuable for PEs as a source of global perspectives, priorities for your term, excellent networking opportunities, and inspiration to energize you and your Club for the coming year.
- SUGGESTION: Hold a Club Assembly (with your President's approval) to discuss ideas for your year with Club members.

## **JUNE 2023:**

- 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).
- SUGGESTION: Hold a Club Assembly (with your President's approval) to present your plans for your year as Club President.
- Make final arrangements for your year as President.

## **JULY 2023:**

Congratulations, Club President! Go for it!