# Reverse Planning Calendar Rotary District 5180

## OCTOBER 2019 – JULY 2020

**TO: 2020 -21 CLUB PRESIDENTS**

This **Reverse Planning Calendar** is to 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 helpful in your planning though 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.

It is important that some of your planning activities be coordinated with your current Club President and Incoming President. During your year, you will not want members unduly distracted from tasks they agreed to do for you. Naturally, you will 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 will make your planning and preparation more efficient. Be your Club President’s biggest supporter, and your successor will likely do the same for you!

# As President Elect

* Set up at least four files:

## 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.
	+ If you are already thinking about issues that may affect you during your year, you’ll see how important it is that you visit other Clubs and talk with other Rotarians.

## QUESTIONS

* + What you don’t know; what you want to know. Use your past presidents, past district governors, assistant governors, group reps and district governor as a resource. If we don’t know, we can look for answers.

## 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 P.E.T.S.) which you may use. Your sitting president has a copy, or you can download one from the RI website rotary.org (download center). You can modify it to suit your club. There is also a sample org chart on your PE flash drive.

## 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 can also give your Bulletin Editor as filler during your year. Another source of articles is the compendium of ideas written by others. The compendium appears in the Opinion & Comment Section at [www.prls.org](http://www.prls.org/)
* As thoughts come to you over the next few 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.
* **Consider Picking Advisors.** Ask at least two 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. Summarize in writing in your “Ideas” folder what’s said at every meeting.
* **Plan Your Communications.** Plan to have a computer, FAX, and Club e-mail address by January, get all members to use email communications. Investigate the possibility of having the Club Bulletin sent via Email to members home. (In some clubs, the financial savings in stamps and printing over a year can amount to an extra Paul Harris Fellowship awarded to one of your staunch supporters after your year is over.)
* **With your Club President’s approval**, plan to attend as many Club Committee meetings as you can. This helps you judge whom to select as Chairs and how to improve the work of each committee.

## Begin increasing your knowledge about Rotary and current developments.

1. Your President receives three copies of Rotary World (5 issues per year). Ask the President to route one copy to you.
2. Check District 5180 Website at rotary5180.org and the Rotary International Website at [www.rotary.org](http://www.rotary.org/) regularly for news and information updates.

## Begin thinking about the goals you want to accomplish.

1. What’s important/of interest to you? Talk to people about your possible plans. Generate ideas and enthusiasm from others by letting them know your goals/interests.
2. Promote Public Relations within and outside of your club. Suggest including a synopsis of the Board Minutes in the Club Bulletin so the membership at large is aware of the decisions the board is making. This will provide a way for the membership to have a voice in the direction the club is going. Have you selected a Public Relations Chair yet?
3. If you don’t have one already, consider a Club Website. Call your District Communications Chair (Numbers and e-mail address are in the District Directory). Ask for information and a listing of the resources available on how to set one up.
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 your year. This keeps you thinking, and helps avoid conflicts. Continue filling in this tentative calendar throughout the year as you plan. To get you started, there is a District Calendar on the District’s Website, and there is a listing of Club Events.
* **Expenses**: Keep track of all of your expenses for reimbursement or tax planning purposes. Talk to your club treasurer and accountant about deductibility issues

## OCTOBER 2018 – “Vocational Service Month”

* Attend other Rotary club meetings to see what works for them and what ideas you can pick up to run your own club more smoothly.
* Offer to assist your club’s current President and the Rotary Foundation Chair with plans for Rotary Foundation Month (November) activities.
* Attend the District Conference – **October 25-27 at Peppermill Hotel in Reno**

* Meet your club’s new members, if any, to find out their interests.

## NOVEMBER 2018 - “Rotary Foundation Month”

* Finalize your organizational chart with board of directors and service chairs.
* Participate in your club’s Rotary Foundation Month activities and/or District activities.
* Talk to you International Chair and have them attend the **International Project Forum, November 16th in Sacramento.**
* Continue to attend other Rotary club meetings.

## DECEMBER 2018 – “Family Month”

* Attend your home club’s Family of Rotary and holiday events.
* Serve on the club selection committee for electing the next president. Some clubs may delay this until February or March. Don’t let that happen in your club. Having a strong leadership team and continuity between years will contribute to your success.
* Work with your President to give the information about you successor to the District Secretary and District Governor Elect.

## JANUARY 2019 – “Rotary Awareness Month”

* Activate your communications links – your computer, fax and your email address.
* Review your committee chair files and firm up your tentative selections for your team members.
* Decide exactly what you want each committee chair to do – be specific. You will receive more guidelines at PETS in February on this topic. In the meantime, ask your current President for his/her PETS information from the previous year. You should determine specifically how you want the job done in your club.
* Attend the **Mid-Year Retreat** with you president – **NEED DATE.**
* If you have not already done so, **register for PETS.**

## FEBRUARY 2019 – “World Understanding Month”

* Meet with your club Treasurer. Obtain copies of the past 3 years’ club budgets and financial statements. Discuss the particulars, especially shortfalls and significant budgetary shifts that occurred in past years.
* Attend your Club’s Foundation (if applicable) meeting to develop a feel for the disbursement of club’s charitable funds.
* Grant training will be conducted next month. If your club is going to apply for a District Grant, learn who must attend the grant training so your club will be qualified.
* Begin to prepare the club budget for your year. The budget should be program driven; figure the cost, and then construct your budget.
* SUGGESTION: Ask your club President to schedule a Club Assembly in the latter part of May to allow you and your team to discuss ideas for your year and solicit input from the club membership about what they want.

## Attend the District’s PrePETS on February 8th.

**MARCH 2019 – “Literacy Month”**

* Select your Board of Directors (BOD) and finalize your club Organizational Chart by completing the selection of your Committee Chairs and other key positions.

## COMPULSARY: Attend President Elect Training Seminar at the Doubletree Hotel in San Jose, March 6th through 8th. Your club should pay for your attendance at this Rotary International required training session. You cannot serve as President without attending a PETS.

* Meet with your BOD and begin discussing:
	+ The status of your club and your plans for your year.
	+ Schedule a BOD Retreat to be held in April or early part of May (if applicable).
* Inform your BOD and all members of your team the dates for the **District Assembly which will be NEED DATE. Make sure they are signed up and will be attending.**
* Attend other Rotary club meetings. Continue to meet with newer members of your club to establish their interests.

## APRIL 2019 – “Magazine Month”

* Develop a summary of your year’s club plans and objectives.
* Discuss your plans with your Assistant Governor to make sure that your plans are realistic and attainable.
* Plan your Board Retreat and send invitations to your Board members and their partners.
* If possible, ask the current President to have you serve on the Awards Committee.
* Applications for District Grants are due to the District on **April 30, 2019**. Make sure you have your project developed, the application completed and turned in to the District’s District Grant Chair.

## MAY 2019 – “Promote International Convention Month”

* Meet with the current and your year Club Secretaries. Ensure a free flow of information within the club and with the District and RI.
* Make sure the current club President and Secretary are preparing for the timely submission of the Semi-Annual Report.
* Make sure that your current president has entered you on the Rotary website as the President Elect so that all information you will need from Rotary will be received. Also make sure your officers are entered on the website so that they get the information sent from Evanston.
* Confer with all of your committee chairs to make sure that they have begun to prepare a written program plan and budget for the coming year. Have them present these at the Board Retreat.
* **Facilitate your Board Retreat** and have a fun filled planning session with your Board members and their partners.
* Plan for your attendance at the Rotary Convention. Many clubs promote this attendance by the President Elect by covering the cost of travel – discuss with the current Board the possibility of such reimbursement. Encourage your Board members’ attendance as **the RI Convention is in Honolulu Hawaii, June 7-10, 2020**.

## JUNE 2019 – “Rotary Fellowship Month”

* Finalize your year’s plans with your Board.
* **SUGGESTION**: Consider making needed changes to your meeting room which may symbolize the beginning of a new Rotary year!
* **Think of a fun event to do for your first meeting**!
* Plan a Club Assembly for July to present your team and your plans to the entire club membership.

## Make sure that the Semi-Annual Report is completed and sent to RI.

* **Attend the RI Convention in** **Honolulu Hawaii, June 7-10, 2020**.
* Attend your current your Club President’s Demotion Parties.
* Get excited – an exciting year is ahead of you!

## JULY 1, 2019

* Hooray! CONGRATULATIONS – Go for it!