**President-Elect Checklist**

**A month-by-month guide to key tasks for a fulfilling and successful term as President-Elect and your year as Rotary Club President**

**PRESIDENT-ELECT**

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Action** | **Learning Resources, People and Events**  *Rotary International resources in Italics* | **Check ✓** |
| July - October | ***Key Tasks: Resources, references and research***    Welcome to your first few months as President-Elect.   * The how, what and why of My Rotary. If you have not already done so make sure that you have established your presence and profile at My Rotary so that you can function effectively on the RI website. Go to [www.rotary.org](http://www.rotary.org) >> “My Rotary” on the top line >> Register>> an email and password is required. * Start out with a look through: Rotary Club Central, Brand Centre, Rotary Showcase, Rotary Ideas, and Learning Centre. * Ensure that you have a log-in and to our own District website. Essential resource for any Rotarian in a leadership role our District. A member log-in will provide access to membership searches, club information and profiles, and membership data, district reports, among other information. * A valuable document to source for this year of preparation is the District Directory. This document is available on the District Website. It is a real mine of information and a real ‘go to’ for practical help and people contacts. * Make a commitment to all the key training dates: Pre-PETS PETS, District Training Assembly, District Conference. * Attend Club Board Meeting for July and carry out any roles that your club may expect of you, e.g. in many clubs it is the PE’s role to motivate and manage the club’s attendance at District Conference. | * District Directory and Annual Calendar * Assistant Governor * District Webmaster * Club Board and leadership team members * Club Board and Officer Position Descriptions |  |

|  |  |  |  |
| --- | --- | --- | --- |
| July - October | ***Key Tasks: Understanding your club***   * Maintain your observations of, and learning about, club operations. * Develop your thinking around the positive aspects: direction of the club, point of difference, things to work on in the future, succession planning. * Actively support all the club projects to learn more about the club engagements and interaction within the community of the club * If you haven’t already, develop a reference file of key documents to aid your understanding, e.g. Club constitution, bylaws and history, and discuss them with your current President * Grow your presence in the club by engaging widely and attending as many club events as possible.   ***Key Tasks: Understanding your members***     * Maintain your observations and learning about club members and their attitudes, dispositions, knowledge & skills. * Develop your thinking around the positive membership aspects, commitment and contribution, challenges to membership, aspects to consider in the future, succession planning strategies. * Begin to plan for club roles and member matches:   + Formalise your observations and list preferences.   + Approach members in timely and systematic manner over the next couple of months.   + Use [www.rotary.org](http://www.rotary.org) for reference material of roles & positions. | * Club Constitution and Bylaws * Club History and publications * Club Archivist * Club President * Committee Minutes * Club website * Club Facebook * SWOT Analysis: Strengths, Weaknesses, Opportunities, Threats * Club member profiles * Club member histories * Current and Past President * *RI Membership Chair Manual* * *Be a Vibrant Club: Your Club Leadership Plan (for Aus, NZ & PI)* * *Strengthening your Membership: Creating Your Membership Development Plan* * District Membership Plan |  |
| October  &  November | ***Key Tasks: Formal President-Elect training, mentoring, and electing your successor***   * Attend **Pre**-***President-Elect Training Seminar*** *(Pre-PETS)*   This is Stage 1 of the Formal President-Elect Training, the first of three essential commitments.   * Follow-up on any tasks and learning required as a result of PETS1. * Read RI Manuals received at PETS1 before passing on to your selected leaders. * Register on-line for ***President-Elect Training Seminar*** *(PETS)* in Auckland as soon as you are notified of registration opening. * Make your accommodation booking at the SPPETS venue or your own arrangements. * Establish a mentoring relationship with your current President, if you have not already done so, so that you can have regular catch-ups about club leadership matters. | *RI Club President Manual*  *RI Chair and Officer Manuals*  District Trainer  District Governor Elect  Assistant Governor  Club President  SPPETS website |  |

|  |  |  |  |
| --- | --- | --- | --- |
| January | ***Key Tasks: Stocktake plan for the next six months***   * Stocktake on your reflections of your club so far and any personal ‘catch-up’ that you plan to do to with resources and references available to you. * Ensure that registration for *President-Elect Training Seminar (PETS) i*s completed along with flights/ or driving and accommodation if it was not done before Christmas. * With the support of your current president, draw up a plan to attend the Club’s Committee meetings as an observer. This will enable a deeper understanding of the work of the club, the current activities and those which you may need to plan for in an ongoing manner during the following Rotary year. * Refer to your *Lead your Club Manual* and *President’s Tool Kit* list and source/research those items not already consulted. | *RI Club President Manual – Lead your Club*  SPPETS website  President’s Toolkit (PETS1 document)  [www.rotary.org](http://www.rotary.org) > My Rotary > Learning & Reference > Learn by Role > Club Roles > President |  |
| February | ***Key Tasks: Setting up your leadership team***   * You may have already invited some people to be on your leadership team, to maintain their current positions for the next year with you, or have them in position on succession/strategic plans.   If not – now is the time to focus on your team for next year:   * + Ensure that you have identified and agreed who your successor will be – the President Elect Nominee   + Draw up your list of positions and suitable members for each position. Remember to create a balance with experience, those who are keen to contribute and first-time leaders in the club.   + Approach identified members in a timely manner.   + Ensure that those accepting your invitation to serve have key dates of Conference, and District Training Assembly diarised & committed.   + Ensure that your Rotary Foundation Chair has all the details of seminars and accreditation events at which their attendance with you will be expected. | * District annual calendar of events * Club Board and Officer Position Descriptions * *RI Chair and Officer Manuals* (on-line, hard copies will come later) * *RI Manuals* * District Trainer * District Governor Elect * Assistant Governor * Club President * President-Elect Nominee * SPPETS website |  |
| March  March continued | ***Key Tasks: Formal President-Elect training at PETS and follow-ups***   * Attend ***President-Elect Training Seminar*** *(PETS).* This is Stage 2 of the formal President –Elect Training, the second of three essential components. * Attend *Area Group* meetings with your current President and get to know your Assistant Governor. * Maintain learning by attending the committee meetings as an observer as planned and widening your information from Rotary publications and websites. Carry-over activities and projects will be clear by now. * Promote and encourage attendance at District Training Assembly and Conference.   ***Key Tasks: Finalise leadership team***   * Make final appointments to your leadership team ensuring that they have key dates of Conference, and District Training Assembly diarised & committed. * Provide RI manuals to your leadership team if you have not already done so. * Ensure you, and the 2016-17 officers of: Secretary, Treasurer, Membership Chair and Foundation Chair are listed at Rotary Club Central by the current secretary. | * *PETS workbook* (distributed at PETS) * Other PETS documents * Networking connections made at PETS * District Governor Elect * Assistant Governor * Area groups of Clubs |  |
| April | ***Key Tasks: Conference, goals, administration, leadership team***   * Attend District Conference if held this month with as many of your club members as possible. * Begin to enter your club plans and goals in your club section of Rotary Club Central. There are three sections to deal with: Your Club, Service, and Foundation Giving. Seek advice from your current secretary if you need assistance. * Print off the final version of your club goals for quick reference. * Update your DGE and AG regarding your club goal planning as required. * Prepare a draft budget in consultation with the Treasurer. * Coordinate with your current President regarding Changeover meetings, functions, invitations and programmes. * Without detracting from the current operation of the Club and current President, set up with, and publish to, your leadership team members specific ways of working, key dates and requirements. | * Club President * Assistant Governor * Area Group Club Presidents & Presidents-Elect * District Governor Elect * Treasurer * President-Elect Nominee |  |
| May  May continued | ***Key Tasks: District Training Assembly, Area Group and Club***   * Attend ***District Training Assembly*** this month or next with all the club officers, directors, or convenors who have agreed to be part of your leadership team. This is Stage 3 of the formal President-Elect Training, the third of three essential components. * At District Training Assembly (DTA):   + attend relevant breakout sessions for PE.   + plan appropriate coverage of breakouts with others attending.   + vote on District budget on behalf of your club.   + ensure attendance at TRF qualification/accreditation seminar if held at DTA * Attend *Area Group* meetings with your current President and maintain learning by attending the committee meetings as an observer as planned. * Continue to enter your club plans and goals in your club section of Rotary Club Central. * Project planning – The Rotary Foundation (TRF):   + Ensure TRF qualification Memorandum of Understanding has been signed and returned   + Share Rotary Foundation project ideas with your Board/Club.   + Develop a plan for implementation.   + Develop the requisite grant application for the District Foundation Chair by the District’s published due date. * Ensure that your Committee Membership is finalised to meet the needs of the club and members. * Begin work on your Club Directory for the new Rotary year with your club members who have that responsibility. | * Club Leadership team 2016-17 * Area Group Club leaders * Assistant Governor * *RI website – Rotary Club Central* * Your Club Membership Directory |  |
| June | ***Key Tasks: The final push- plans, processes and protocols***   * Attend Area group meetings with your current President. * If you have not already done so, complete your Club Directory for the new Rotary year with your club members who have that responsibility and have it published ready for Changeover. * Finalise your club plans and goals in your club section of Rotary Club Central so that your DG and AG can access your planning and understand where your club is heading for the new Rotary year. * Consider holding an unofficial ‘New Board’ Board meeting to socialise, set up procedures, and share goals and draft budget. * Hold an *Incoming and Outgoing Officers and Directors Board Meeting* for your club in conjunction with the outgoing President. * Present your goals and draft budget at the Board meeting. * Encourage attendance at District Changeover if applicable. | * Club President * President-Elect Nominee * Assistant Governor * Area Group * Secretary * Treasurer * Leadership team |  |
| July | ***Key Tasks: Settle into the President role***  Congratulations, you are ready – enjoy the year – you will be successful.   * Hold the first official board meeting of the 2016-17 Rotary year, confirming previous goals, budgets and plans. * Confirm processes for Board management and expenditure. * Plan for key events e.g. DG visit, Club Forum, AGM. * Attend the first committee meetings to show support, and share your vision and goals. * Remember:   Lead with enjoyment and motivation Plan and communicate well.  Organise and time-manage effectively Monitor and support your committees  Seek advice without hesitation Resolve any issues promptly  Continue learning | * Assistant Governor * Area Group * District Governor * RI website * District website * Club website * Club Facebook * Bulletin editor |  |
| August and beyond | ***Key Tasks: Leadership, communication, mentoring, monitoring***     * Support your President-Elect with District Training opportunities and requirements * Share District communications to the President with your President-Elect * Encourage President-Elect and interested members to attend Rotary learning opportunities, e.g. Rotary Leadership Institute (RLI), Future Leaders Seminar (FLS), for the benefit of themselves as Rotarians as well as the Club and the District. * Monitor chairs, committees and members individually for engagement, achievement and satisfaction as a Rotarian * Regularly monitor progress of club goals, and update club achievement in Rotary Club Central * Prepare and deliver reports as applicable to Board and club meetings * **ENJOY!** | * Assistant Governor * Area Group * District Governor * RI website * District website * Club website * Club Facebook * Bulletin editor * President-Elect * New members |  |

*Compiled from: Rotary International and Districts’ documents*