

# CLUB ADVOCATE PREPARATION TIMELINE

Rotary  
District 6450



Use this timeline to prepare for your role. It contains the best practices and tips.

## *January-February (before taking office)*

**Understand the leadership roles that you'll be working with at the club and district levels. Try to meet the people who'll hold these positions during your year:**

District Leaders	Club Leaders
Governor	Presidents
Governor-elect	Secretary or executive secretaries
Governor-nominee	Treasurers
Learning facilitators	Learning facilitators
Other club advocates	
Secretary or executive secretaries	
Past district governors	

## *January-February*

**Access the Learning Center and complete:**

- [Assistant Governor Basics learning plan](#)
- Other courses and learning plans based on your needs

## *February*

**Work with the district leadership team:**

- Understand the structure of the district team and how its members support club committees.
- Determine a plan for communicating with your team.
- Discuss district goals with the governor-elect.
- Check with the district to see whether you'll have a budget for the year.
- Decide how online membership leads will be managed.

- Work with the outgoing club advocate and the district team to make consistent, realistic, and long-lasting plans for supporting each club.

### *February-March*

#### **Understand how to use Rotary's online tools:**

- Resources in My Rotary under the [Manage](#) tab
- [Rotary Club Central](#)
- [Online Membership Leads](#) at the district level
- [Rotary Showcase](#)
- [Discussion groups](#)
- [Brand Center](#)
- [District 6450 Website](#)
- [Administrative Tools of DACdb](#)

### *February-June*

#### **Work with the outgoing club advocate:**

- Learn about each club's successes, challenges, and culture.
- Get suggestions for working with these clubs.
- Find out what tools the club advocate used to manage clubs.
- Ask about their approach to working with each club.
- Observe club visits with your predecessor before you take office.

### *February-June*

#### **Get to know your clubs' strengths and weaknesses. Use this information to help plan your year:**

- Review their goals, achievements, and ratings in Rotary Club Central.
- Review membership, Foundation, club balance, and other reports in My Rotary.
- Read your clubs' newsletters and follow their accounts on social media.
- Assess your clubs based on their:
  - Operating structure and effectiveness
  - Overall strength, including membership, Foundation giving, financial situation, management practices, and stewardship
- Work with the district team to create a plan for clubs that need the most attention and for those that are performing well.

### *February-April*

#### **Attend training sessions, including:**

- The district team training seminar
- The presidents-elect training seminar (PETS)
- The district training assembly

### *February-May*

#### **Work with incoming club presidents during PETS:**

- Build relationships so you understand their needs.
- Encourage them to identify their club's needs.
- Encourage club officers to create [My Rotary](#) accounts.
- Help them develop or refine their club goals and enter them in Rotary Club Central.
- Make sure current club officers add [incoming club officers](#) to My Rotary or DACdb. (You'll receive a list from Rotary in March of club officers who haven't been reported.)
  - Club officers should be reported by 1 February for the following year.
  - Club presidents, secretaries, treasurers, Foundation chairs, and membership chairs can add new officers.
- Discuss how the district and your clubs will manage online membership leads.

### *April-June*

#### **Schedule your club visits for the year:**

- Plan to visit each club at least once per quarter.
- Schedule your visits based on the club's needs.
- Ask the previous club advocate how they scheduled their visits.
- Meet with your club presidents monthly, either in person or virtually, to stay current on their successes and challenges.

### *Ongoing*

#### **Make sure that you are familiar with the latest Rotary initiatives, policies, and resources:**

- Subscribe to [Rotary newsletters](#), including Rotary Leader.
- Visit My Rotary often for news, videos, and stories.

- Become familiar with resources available on My Rotary.
- Be a [Rotary Action Plan champion](#) and help your clubs embrace the Action Plan at the club level to grow Rotary and increase our impact.
- Refer to [Rotary's governance documents](#) when you work with clubs on matters concerning policy. Your [Club and District Support representative](#) can also help.