AG topics for PEs at PETS

**A. Relationship of PE to AG and Area Team**

1. Advise PE of team members (AG, Area Foundation Advisor, Membership Advisor, Public Image Advisor). Team members may differ from year to year.

2. Explain how you will operate as the Assistant Governor

**B. Planning of time sensitive actions.**

1. Youth Protection Officer certification:
   1. An annual process done online
   2. Have a club member tasked to complete the certification prior to July 1 (a session is planned for DTA).
2. District Training Assembly:
   1. Date: **May 6, 2017**
   2. Max **attendance by your Board members** (not very productive if the president only attends)
3. District Grant
   1. **Submit district grant application by June 1** in order to have funds approved during your tenure. All information will be posted on the district website under district grants. Carol Foley is the district grant chair.
   2. Be sure to attend the Grant Management Seminar this spring and sign the MOU. **Without the training and a signed MOU, a club cannot participate in any Foundation grants.**
4. Planning Guide for Effective Rotary Clubs
   1. Complete online submission by **June 15**
   2. A good tool for analyzing your club and setting goals & helps the DG learn about the club
5. Your club’s Installation event’ (i.e., dinner, picnic, etc)
   1. Begin joint planning between you and current club president
   2. Checklist for planning:
      1. Any outside speakers or presenters? If so, schedule them now.
      2. Who is ordering officer pins and when?
      3. How would you like to conduct the change of club officers?
         1. Does it involve swearing in by Rotarians outside your club?
         2. How can you involve charter members or the most senior club members?
         3. Will there be a way to acknowledge the presence of past presidents?
         4. Toasts? A series of toasts to others in the community, e.g., public safety officials, teachers, military, organizations who care for the needy, etc.
6. July 1: Due date for:
   1. RI SAR dues (semi-annual)
   2. District dues (annual)
7. AG team visits: Typically July and August with your Board and Club
8. DG visits: Typically Aug – Nov. with your Board and Club. The Governor will present the program. **Do not schedule any other program for this day of the official DG visit.**

**C. Presidential actions:**

1. Bylaws: Each year, each President and Board is expected to review make at least one improvement if needed to it so it stays current.
2. Establish an annual budget that specifically lists all revenues and expenses for (1) Club Ops, and (2) Service Projects. For all expense activities, each has a –
   1. Due date
   2. Designated person responsible for the coordination and execution
   3. Begin each Board meeting with a review of the budget so all activities go as planned/scheduled
3. Board meetings:
   1. Some clubs conduct these monthly followed by a monthly Club Assembly.
   2. Start with review of budget and update your budget monthly.
   3. Review all club projects to determine which to keep or delete for your year.
      1. Are there new projects to be started?
      2. Capture all projects in your budget.
   4. Review of goal status for –
      1. Membership
      2. Foundation
   5. Review of District’s priorities for the year to see how your club is contributing
4. Socials (consider assigning this to your newest members)
   1. Will these be monthly or quarterly or during those months where the club would meet a 5th time?
5. Recognition/Awards status for –
   1. RI President’s Citation
   2. Governor’s District Citation
   3. District Areas of Service & PI recognitions
6. Be A Vibrant Club, Your Club Leadership Plan

a. Use to ensure that your club is regularly evaluating current practices and implementing new ideas to increase their vitality.

b. Set long term and annual goals, conduct club assemblies, communicate clearly, ensure leadership continuity, amend club by-laws, develop stronger relationships, ensure members are active, develop a training plan, and assign club committees.

c. After meeting with your board, begin entering your goals in the 2016-2017 tab in Rotary Club Central

1. Long Range Planning:
   1. Often the responsibility of club’s 3-member Executive Committee:
      1. Immediate Past President
      2. President
      3. PE
   2. Review compliance with club’s Strategic Plan
   3. Recommend goals for an additional year to the current Strategic Plan