

Leading Your Committee to Success

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Introduction

This checklist is a simple, at-a-glance tool to help you feel confident and organized in your role as a Rotary Committee Chair. It highlights key actions that support strong committees, meaningful projects, and engaged members.

Use this checklist alongside the *Committee Leaders Guide: Developing Leaders and Maximizing Community Impact*. The Guide provides the leadership perspective; this checklist helps you put it into action—easily and effectively.

Think of it as a friendly reminder, not a to-do list—here to support your leadership and help your committee succeed.

Getting Started

Team Formation

- Schedule one-on-one conversations with each committee member
- Identify members' skills, interests, and time availability
- Designate a vice-chair or co-lead for continuity
- Create a contact list with all member information
- Establish preferred communication methods (email, text, app, etc.)

Planning & Goal Setting

- Review club strategic goals and how your committee supports them
- Meet with the previous chair to understand ongoing initiatives
- Set 3-5 specific goals for the year with measurable outcomes
- Create a calendar of key activities, meetings, and deadlines
- Identify budget needs and submit to club treasurer

Establishing Key Partnerships

Connect with Club Service Leads

- **Public Relations Lead** – Attend Club Board meeting to discuss:
 - Committee goals and planned activities
 - Key messages about your committee's impact
 - Timeline for announcements and recognition needs
 - Process for submitting news items and updates
- **Social Media Coordinator** - Establish working relationship for:
 - Event promotion (2-3 weeks advance notice)
 - Real-time coverage during activities
 - Post-event highlights and impact stories
 - Member recognition and engagement content
 - Photo and video sharing protocols
- **Volunteer Coordinator** - Align on:
 - Volunteer recruitment needs for each project
 - Lead time required for securing volunteers
 - Sign-up process and communication flow
 - Volunteer tracking and hour reporting
 - Recognition of volunteer contributions
- **Membership Chair** - Coordinate on:
 - New member engagement opportunities through your committee
 - Showcasing your committee to prospective members
 - Member retention through meaningful involvement

Running Effective Meetings

Before Each Meeting

- Send agenda 3-5 days in advance
- Include any pre-reading materials or decisions needed
- Confirm date, time, and location/link
- Prepare any reports or updates needed

During Meetings

- Start and end on time
- Review action items from previous meeting
- Encourage participation from all members
- Make decisions and assign clear responsibilities
- Document action items with owners and deadlines

After Meetings

- Distribute meeting notes within 48 hours
- Follow up on action items as needed
- Update project tracking tools or calendars

Project Management

Planning Phase

- Define clear project objectives and success measures
- Assign a project lead and team & Identify community partners and stakeholders
- Create project timeline with milestones & Determine budget and resource needs
- Obtain necessary approvals from board/president

Promotion Phase (2-3 weeks before)

- Provide event details to Public Relations Lead
- Work with Social Media Coordinator on promotional content
- Submit volunteer needs to Volunteer Coordinator
- Create and distribute promotional materials
- Confirm logistics (venue, supplies, equipment)
- Brief all participants on roles and expectations

Execution Phase

- Ensure all resources and materials are ready
- Brief volunteers on their roles & Track participation and impact metrics
- Coordinate with Social Media Coordinator for real-time coverage
- Document the event (photos, videos, testimonials)
- Thank volunteers and partners immediately after

Follow-Up Phase

- Compile impact data (people served, hours, dollars raised, etc.) & Send thank you notes to volunteers, partners, and donors
- Provide recap to Public Relations Lead for club communication
- Share highlights with Social Media Coordinator
- Conduct brief team debrief: what worked, what to improve & Report outcomes to committee and club

Communication & Reporting

Regular Club Updates – 1st club meeting of the month

- Provide monthly committee report to club
- Highlight member contributions and achievements
- Share upcoming opportunities for club involvement

Partner Communication

- Provide monthly activity preview to Public Relations Lead
- Share project photos/content with Social Media Coordinator promptly
- Update Volunteer Coordinator on upcoming volunteer needs
- Keep club board informed of significant developments

External Communication

- Maintain relationships with community partners
- Coordinate media outreach through Public Relations Lead
- Respond promptly to inquiries about your committee
- Represent committee at community events when appropriate

Leadership Development

Empower Your Team

- Delegate meaningful responsibilities to committee members
- Rotate leadership opportunities across different projects
- Provide coaching and support to project leaders
- Identify mentorship pairs between experienced and new members
- Encourage members to attend leadership training

Recognition

- Acknowledge individual contributions at meetings
- Nominate deserving members for club/district awards
- Share success stories with Public Relations Lead
- Celebrate milestones and achievements as a team

Measuring Success

Track Key Metrics

- Number of people served/impacted
- Volunteer hours contributed
- Funds raised or grants secured
- Community partnerships established
- Media mentions and social media engagement
- Member participation and satisfaction

Document Impact

- Collect testimonials from beneficiaries and partners
- Gather before/after photos and data
- Create brief case studies of successful projects
- Maintain records for annual reports and grant applications

End of Year Transition

Prepare for Succession

- Document processes, contacts, and lessons learned
- Create a comprehensive handoff document for incoming chair
- Identify and mentor potential successor
- Archive important files and records
- Meet with incoming chair to share insights

Final Reporting

- Complete annual committee report with accomplishments
- Present year-end summary to club
- Thank committee members and partners
- Provide recommendations for next year's priorities
- Celebrate your committee's achievements

Quarterly Self-Check

Every 3 months, assess:

- Are we making progress toward our annual goals?
 - Is every committee member engaged and contributing?
 - Are we effectively partnering with club service leads?
 - Are we measuring and communicating our impact?
 - What adjustments do we need to make?
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Quick Reference: Who to Contact When

Need event promoted? → Public Relations Lead (3 weeks advance)

Need social media coverage? → Social Media Coordinator (2 weeks advance)

Need volunteers? → Volunteer Coordinator (2-3 weeks advance)

Need budget approval/reimbursement? → Club Treasurer/President

Need supplies or resources? → Club Administrator/Secretary

Need guidance or support? → Club President or Mentor

Remember: Your role is to facilitate, not to do everything yourself. Build leaders, distribute ownership, and create systems that outlast your term. Success is measured not just by what you accomplish, but by how many people you develop along the way.