



## Club President's Monthly Checklist

This checklist is designed to help Rotary club presidents-elect and presidents plan and monitor club activities on a monthly basis. It also serves as a monthly reminder of activities and deadlines that apply to all Rotary clubs.

You should read the entire checklist to gain an overall perspective of the next 18 months. You may wish to place a check (✓) in each box after the item has been addressed to your satisfaction. An asterisk (\*) indicates a Rotary Foundation-related item. Please contact The Rotary Foundation of Rotary International for more details.

The Rotary events listed below do not have fixed dates. Write the dates that your club will attend the events on the lines below and then add them to the appropriate month on the blank lines provided. You can also use the blank lines in each month to add local events that are specific to your club.

District conference \_\_\_\_\_

District leadership seminar \_\_\_\_\_

District membership seminar \_\_\_\_\_

District Rotary Foundation seminar \_\_\_\_\_

Official visit of district governor \_\_\_\_\_

Assistant governor visits \_\_\_\_\_

Club assemblies \_\_\_\_\_

Installation of club officers \_\_\_\_\_

Visit the RI Web site, [www.rotary.org](http://www.rotary.org), for details on specific programs listed or contact your Club and District Support representative with any questions. You may also download this form from the RI Web site.

## **As President-elect**

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### **January Rotary Awareness Month**

- ☐ Begin developing goals and appointing committee chairs.
- ☐ Begin preparing for next year's club budget and reviewing the status of continuing club projects.
- ☐ Register for presidents-elect training seminar (PETS).
- ☐ Encourage all incoming club officers and new members to attend the district assembly.
- ☐ Check with District Rotary Foundation Chair to determine the availability of DDF to support Ambassadorial Scholarships/Rotary Grants for University Teachers
- ☐ Check with the District Scholarships Subcommittee Chair to determine the district deadline to submit Educational Programs applications.
- ☐ Educate the club about the Ambassadorial Scholarships/Rotary Grants for University Teachers, Rotary World Peace Fellowships programs and promote them in your community. \*
- ☐ Educate your club about the Rotary Peace and Conflict Studies Program and promote it in your community. Begin recruiting applicants for Session II (January-April) of the program.

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### **February World Understanding Month**

- ☐ Hold the first meeting of the board-elect.
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### **March Literacy Month**

- ☐ Attend PETS on \_\_\_\_\_ March.
- ☐ Set the club's annual giving goal to The Rotary Foundation, taking into account the "*Every Rotarian Every Year*" campaign.
- ☐ Contact Governor-elect to confirm Group Study Exchange (GSE) pairing for the coming year. Begin promoting GSE program within the club and encourage Rotarians to recruit potential GSE team member candidates and/or consider applying for the position of GSE team leader.

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### **April Magazine Month**

- ☐ Attend the district assembly with other incoming club officers on \_\_\_\_\_ April or May.

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### **May**

- ☐ Review the status of current club projects and how they will affect planning for the upcoming year.

- ☐ Review the status of current Humanitarian Grants and ensure progress/final reports have been submitted.

- ☐ Hold club assembly to discuss plans made at district assembly and upcoming RI theme. Discuss goals set for giving to The Rotary Foundation.

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**June Rotary Fellowships Month**

☐ Confer with the secretary and incoming secretary to update the RI membership database via the web, [www.rotary.org](http://www.rotary.org) / member access, on 1 June, so that the July Semiannual Report from Rotary International will be up-to-date and accurate.

☐ Finalize the Planning Guide for Effective Rotary Clubs and submit it to the district governor-elect or assistant governor before 1 July.

☐ Finalize the club budget for the coming year.

☐ Finalize Rotary Foundation contribution goals for the coming year.

☐ Confer with the outgoing president to ensure a smooth transition.

☐ Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.

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## As President

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### July

- ☐ Plan and conduct monthly board meeting.
- ☐ Promote attendance at the district conference.
- ☐ Initiate membership development programs for the year.
- ☐ Review current RI sponsored membership development certificate programs
- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- ☐ Plan and conduct a club assembly to discuss and adopt the year's program. Affirm goals set for the club's participation in Rotary Foundation programs.
- ☐ Work with the club secretary to complete the RI semiannual report and send with dues to RI. Submit district per capita dues, if applicable. A past-due reminder notice will be sent on 1 October if RI dues have not yet been paid.
- ☐ Endorse the nomination of a club member for the Four Avenues of Service Citation for Individual Rotarians, between 1 July and 30 June. Inform the governor. Contact the RI Programs staff for details.
- ☐ Request club Foundation committee and district Alumni Subcommittee Chair to identify outstanding nominee for The Rotary Foundation Alumni Service to Humanity Award. \*
- ☐ Submit applications for Matching Grants and proposals for 3-H Grants. \*
- ☐ Update classification roster. Prepare current list of filled and unfilled classifications.
- ☐ Contact the District GSE Chair to confirm deadlines for submitting GSE team member/leader applications for district GSE selections. Recruit young professionals between the ages of 25-40 and encourage qualified candidates to submit a GSE Team Member Application. \*
- ☐ Rotary World Peace Fellowships: applications due to The Rotary Foundation from districts by 1 July.

☐ Promote the Rotary Peace and Conflict Studies program to attract well-qualified candidates.

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### **August Membership and Extension Month**

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Conduct club activities to support membership development and extension efforts.

☐ Promote attendance at the district membership seminar.

☐ Induct appropriate Scholar and Group Study Exchange team member alumni.\*

☐ Consider nominating a club member for one of these service awards from The Rotary Foundation: District Service Award, Citation for Meritorious Service, or Distinguished Service Award. \*

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### **September New Generations Month**

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Conduct youth-related activities and programs.

☐ Nominations for The Rotary Foundation Service to Humanity Award must be received at The Rotary Foundation Alumni Relations Section, RI World Headquarters by 2 September. \*

☐ Monitor membership development initiatives and goals.

☐ Endorse qualified GSE team members' applications and submit them to the district GSE selection committee by their deadline for consideration. \*

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### **October Vocational Service Month**

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Conduct vocation-related activities and programs.

☐ Monitor membership development initiatives and goals.

☐ Ambassadorial Scholarships: applications due to The Rotary Foundation from districts by 1 October. \*

☐ Rotary Grants for University Teachers: applications due to The Rotary Foundation from districts by 1 October.\*

☐ Based on the club's contributions to The Rotary Foundation, submit a timely request for Paul Harris Fellow recognition items, for presentation at a club ceremony during November, "Rotary Foundation" Month. \*

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### **November Rotary Foundation Month**

- ☐ Plan and conduct monthly board meeting.
- ☐ Promote attendance at the district conference.
- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- ☐ Conduct related activities and programs on Rotary Foundation programs, including PolioPlus, and fund development.
- ☐ Week including 5 November is World Interact Week. Support your local Interact club or help organize one.
- ☐ Monitor membership development initiatives and goals.
- ☐ 15 November: Deadline to submit nominations for The Rotary Foundation Distinguished Service Award. \*
- ☐ 15 November (U.S. clubs only): Deadline to submit IRS Form 990 (and possibly form 990-T) to U.S. Internal Revenue Service. Contact the IRS for report forms, filing limits, and other requirements.
- ☐ Request club assistance in hosting the visiting Group Study Exchange (GSE) teams in the district. Forward contact information of interested Rotarian hosts to the district GSE Chair. \*
- ☐ Inform district GSE Chair of your club's interest in having an inbound or outbound GSE team make a presentation at your club. \*
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- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_



**December Family Month**

- ☐ Plan and conduct monthly board meeting.
- ☐ Promote attendance at the district conference.
- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- ☐ Confer with the secretary to update the RI membership database via the web, [www.rotary.org](http://www.rotary.org) / member access, on 1 December, so that the January Semiannual Report from Rotary International will be up-to-date and accurate.
- ☐ Assess the progress of club projects and provide progress reports for Humanitarian Grants as required by the Foundation.
- ☐ Conduct activities to demonstrate your club's commitment to family and community.
- ☐ Hold annual club election no later than 31 December.
- ☐ Monitor membership development initiatives and goals.
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**January Rotary Awareness Month**

- ☐ Plan and conduct monthly board meeting.
- ☐ Promote attendance at the district conference.
- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- ☐ Conduct activities and programs to provide members with continuing education on RI and to publicize Rotary to the community.
- ☐ Plan to send club representatives to the district conference and to the RI Convention.
- ☐ Work with the club secretary to complete the semiannual report and send with dues to RI. Submit district per capita dues, if applicable. A past-due reminder notice will be sent on 1 April if RI dues have not yet been paid.
- ☐ Monitor membership development initiatives and goals.
- ☐ Conduct a semiannual checkup on all committee activities and objectives.
- ☐ Plan and conduct club assembly to review progress toward all club goals.
- ☐ Promote availability of Ambassadorial Scholarships and Rotary Grants for University Teachers locally. Check with district scholarships chair on deadline for clubs to submit applications for the district-level competition. \*
- ☐ Promote availability of world-competitive Rotary World Peace Fellowships. Check with district Rotary World Peace Fellowships chair on deadline for clubs to submit applications for the district-level competition. \*
- ☐ 31 January: Deadline for reporting next year's club president and secretary to RI for the Official Directory (007-EN), and to the district governor-elect.
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- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### **February World Understanding Month**

- ☐ Plan and conduct monthly board meeting.
- ☐ Promote attendance at the district conference.
- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- ☐ Conduct club activities to promote world understanding and peace.
- ☐ 23 February (Rotary's anniversary) is World Understanding and Peace Day. Conduct activities that emphasize Rotary's commitment to international understanding, friendship, and peace.
- ☐ Monitor membership development initiatives and goals.
- ☐ Promote attendance at the RI Convention.
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- ☐ \_\_\_\_\_
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### **March Literacy Month**

- ☐ Plan and conduct monthly board meeting.
- ☐ Promote attendance at the district conference.
- ☐ Conduct literacy related activities and programs

- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- ☐ Week including 13 March is World Rotaract Week. Conduct activities in support of your local Rotaract club or help organize one.
- ☐ Monitor membership development initiatives and goals.
- ☐ 15 March: Deadline for governors to submit one club nomination for RI's Significant Achievement Award. Contact the district governor for details.
- ☐ 31 March: Last day to submit a Matching Grant application for funding consideration in the current Rotary year. \*
- ☐ 31 March: Last day to submit a 3-H Grant proposal for funding consideration in the following Rotary year. \*
- ☐ If GSE team member sponsored by Club was selected for outbound GSE team, invite the candidate to Rotary Club meetings as part of orientation and to speak at Club.
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### **April Magazine Month**

- ☐ Plan and conduct monthly board meeting.
- ☐ Promote attendance at the district conference.
- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- ☐ Conduct a club program on THE ROTARIAN or a Rotary regional magazine.
- ☐ Consider a nominee for The Rotary Foundation Citation for Meritorious Service; nominations received after 15 May will be returned to the nominator. Contact your district governor for details. \*
- ☐ Monitor membership development initiatives and goals.
- ☐ 15 April: Deadline for governors to submit Presidential Citation certification forms for clubs to RI. Advise the district governor if the club has met the qualifications for the Presidential Citation according to the schedule determined by the district governor.
- ☐ 1 April: Deadline for clubs to submit detailed explanation of their membership development strategy, initiative, or program to their district governor for consideration of a Membership Development Initiative (MDI) award.
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### **May**

- ☐ Plan and conduct monthly board meeting.
- ☐ Promote attendance at the district conference.
- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.
- ☐ Monitor membership development initiatives and goals.
- ☐ Review the status of current Humanitarian Grants and ensure progress/final reports have been submitted.

☐ 15 May: Deadline for governors to submit one club nomination for the RI Public Relations Award. Contact the district governor for details.

☐ 15 May: Deadline to submit nominations for The Rotary Foundation Citation for Meritorious Service. \*

☐ Invite returning GSE team members to speak at Club about their recent GSE experience. Invite qualified GSE alumni to consider membership in your Club.

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### **June Rotary Fellowships Month**

☐ Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Promote club members' participation in Rotary Fellowships.

☐ Send club representatives to the RI Convention.

☐ Prepare a year-end audit of the club's financial transactions, working with club secretary and treasurer. Submit a financial statement to the club about its fiscal status.

☐ Prepare a final report to the club on its Rotary Foundation goal achievements and program participation.

☐ Monitor membership development initiatives and goals. Provide the club with a final report on membership growth and identify areas requiring continued action.

☐ Confer with the president-elect to ensure a smooth transition.

☐ Assess all Humanitarian Grants activity and provide progress or final reports to The Rotary Foundation for all open grant projects. \*

☐ If Club sponsored a GSE team member candidate, ensure that the candidate has submitted a final report to the GSE district Chair. Continue to involve GSE alumni in Club activities.

☐ Plan a dignified ceremony for the installation of next year's club officers.

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CLUB PRESIDENT CHECKLIST 06-07 EN



**Goal :** Here is one thing I plan to do differently as a result of this training.

SMART Objective: \_\_\_\_\_

S pecific \_\_\_\_\_

M easurable \_\_\_\_\_

A chievable/Agreed to \_\_\_\_\_

R ealistic/Result-oriented \_\_\_\_\_

T ime-framed (goal attainment date) \_\_\_\_\_

Action Steps to take to achieve this goal:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

Helpful People or Tools: (Who/what can help me achieve my goal?)

\_\_\_\_\_

\_\_\_\_\_

Additional Training or Knowledge I may need: \_\_\_\_\_

\_\_\_\_\_

How I plan to celebrate my success! \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

### **Session 3 Resources:**

#### Leadership / Club President

<https://my.rotary.org/en/learning-reference/learn-role/president>

<https://my.rotary.org/en/document/leadership-action-your-guide-starting-program>

#### Goals / Action Plan

[https://www.carolinaspets.org/files/PETS\\_Email\\_Workbook\\_Unit\\_2.pdf](https://www.carolinaspets.org/files/PETS_Email_Workbook_Unit_2.pdf)

<https://creately.com/blog/diagrams/how-to-write-an-action-plan/>

#### Delegation

<http://secretstotheirsuccess.com/interpersonal-skills/how-to-develop-delegation-skills/>

## Suggested Tasks for President-Elect and President 2021 – 2022

<b>January 2021</b> <i>Vocational Service Month</i>		Confirm your in-coming Board (as per club's December Election).
		Confirm/assign Avenue of Service with each Director (as appropriate/applicable).
		Consider Committee structure and potential Committee Chairs.
		Enter club officers into the RI database – <a href="#">My Rotary</a> [Sign-in > Manage > Club Administration] or via <a href="#">ClubRunner</a> if integrated with RI. (Usually responsibility of Club Secretary.)
		Meet and Communicate with your Club's AG
		Confirm registration for PETS
		Update or create the club's strategic plan
<b>February 2021</b> <i>Peace and Conflict Prevention/ Resolution Month</i>		Meet with your in-coming Board to discuss your club's goals and service activities for new year. Use the Rotary Club Central (RCC) <a href="#">Planning Worksheet</a> to assist you with preparing the goals.
		Complete any pre-PETS activities/training
		Review past club budgets and begin planning for new Rotary year
<b>March 2021</b> <i>Water and Sanitation Month</i>		Attend PETS
		Review club by-laws and club constitution
		Finalize committee chairs
		Register for District Assembly
		Register for District Conference
		Enter any finalized club goals into Rotary Club Central
		Encourage Board Members and members to attend District Assembly
<b>April 2021</b> <i>Maternal and Child Health Month</i>		Attend District assembly
		Promote and encourage leadership training opportunities
		Review President's manual
		Confirm date for District Governor's visit
		Begin planning for change of leadership and celebration
		Advise your AG of any significant planned events
<b>May 2021</b> <i>Youth Service Month</i>		Finalize goals and enter into Rotary Club Central
		Review Presidential Citation requirements
		Finalize club's budget
		With current President, review and enter present RY accomplishments
		Conduct a board retreat with new board
		Review expectations of board members/committee chairs
<b>June 2021</b> <i>Rotary Fellowships Month</i>		Attend Rotary International Convention
		Recognize outgoing President

## Suggested Tasks for President-Elect and President 2021 – 2022

		Confirm that club's membership numbers are accurate
		Schedule the "Pass the Gavel", "President changeover"
		Affirm that all committees are fully staffed
		Attend RI Convention in Hamburg
		Schedule your Board Meeting for the year
<b>July 2021</b>		Make sure that your Club's RI Member invoice has been paid
		Confirm visit from DG in on club calendar
		Present RI Presidential Citation to Club
		Confirm Club Committees have regularly scheduled meetings
		Promote your goals to Club
		Present Club budget
		Check for nominations to RI for awards
<b>August 2021</b> <i>Membership and New Club Development Month</i>		Encourage membership growth and development
		Review Rotary Club Central goals and objectives, entering any achievements.
		Promote the fall District Assembly
		Encourage members to attend leadership training opportunities
		Confirm fellowship activities have been planned for the year
<b>September 2021</b> <i>Basic Education and Literacy Month</i>		Promote the Rotary Leadership Institute (RLI) sessions
<b>October 2021</b> <i>Economic and Community Development Month</i>		Promote End Polio Now campaign
<b>November 2021</b> <i>Rotary Foundation month</i>		Preparation of federal form 990
<b>December 2021</b> <i>Disease Prevention and Treatment Month</i>		Conduct Club elections
		Encourage registration to RI Convention
		Confirm IRS Form 990 has been filed
		Confirm that membership is up-to-date in preparation of second half dues payment
		Update accomplishments on RCC
<b>January 2022</b> <i>Vocational Service month</i>		Assure payment of Rotary semi-annual dues
		Review Club goals
<b>February 2022</b> <i>Peace and Conflict Resolution Month</i>		Review
		Confirm PE is registered for PETS

# Suggested Tasks for President-Elect and President 2021 – 2022

<b>March 2022</b> <i>Water and Sanitation Month</i>		Work with the PE to schedule a meeting to update your Club's strategic plan
<b>April 2022</b> <i>Maternal and Child Health Month</i>		
<b>May 2022</b> <i>Youth Service Month</i>		Plan the date for the President change over event
<b>June 2022</b> <i>Rotary Fellowships Month</i>		Make sure the Club's membership list is accurate
		Provide for a final budget report for 10-20
		Enter final accomplishments for RCC
		Recognize out-going Board members



# ROTARY'S ACTION PLAN

## WHAT CLUBS CAN DO

Rotary's Action Plan builds on our past successes and sets our future direction to ensure that we continue to grow, unite people, and make a lasting impact.

We encourage all members to review the Action Plan, think about your own club and district goals, and find meaningful ways to align those goals with our plan. Have open and ongoing discussions in your club and throughout your district about the new priorities and objectives, then use those talks to shape your own strategies.

For each of the four priorities that will direct our work, we've listed ways you can put that goal into practice. Think about how *you* can bring Rotary's Action Plan to life.



# ROTARY'S ACTION PLAN

## INCREASE OUR IMPACT



**DEVELOP A STRATEGY** for educating members about the importance of impactful service projects. Research shows that measurable, data-driven results offer proof of the impactful service that is attractive to the next generation of leaders.

**CONDUCT A COMMUNITY ASSESSMENT** to determine which issues are top concerns in the area. Learn about needs and strengths and identify the key decision-makers. Try conducting evaluations both before and after you implement projects to get a better sense of where and how you can create measurable, lasting change that truly helps the communities you serve.

**FOCUS YOUR EFFORTS.** Review your club's activities and determine which ones can be streamlined or eliminated so your club can spend more time on activities that make a real impact.

**ENCOURAGE YOUR CLUB OR DISTRICT TO CELEBRATE THE LONG-TERM SUCCESSES** of service and program offerings, but to be open to new projects or opportunities to prove that your club or district's impact has only begun. Apply for a global or district grant to fund a project that will have sustainable, measurable outcomes.

## EXPAND OUR REACH



**SET A GOAL** to collaborate with new groups in your community, either through service projects or social events, to introduce more people to Rotary. As our vision statement says, we want to unite people — not just Rotarians — to create lasting change.

**USE ROTARY'S MEMBERSHIP TOOLS** and resources to assess your club and learn how to make it more diverse, open, and attractive to everyone in your community.

Districts should **CONSIDER FORMING NEW CLUBS.** Take advantage of our flexible club models to create clubs that are welcoming to people with diverse interests, backgrounds, and needs. As always, these new clubs should embrace our core values and deliver value to members.

**BE SURE TO TELL COMPELLING STORIES** about how your club or district is making a difference. Use the People of Action materials and other resources in the Brand Center to learn how to show your club or district's impact through the media, on social media, and in the community. Strengthening your public image can help you attract like-minded people to your club, form new partnerships for service, and build a stronger and more diverse network of collaborators.



## ENHANCE PARTICIPANT ENGAGEMENT



**FOCUS NOT ONLY ON GAINING NEW MEMBERS BUT ALSO ON DELIVERING VALUE** — both personal and professional — to current members. Hold a brainstorming session or use a survey to ask members what's important to them in their club experience and how they want to grow and develop through Rotary.

Consider everyone who encounters Rotary a participant. Invite them to **OFFER NEW IDEAS AND SHARE THEIR THOUGHTS**. Encourage them to stay involved (whether or not they join the club) so they feel valued and are inspired to support Rotary activities.

**USE OUR CURRICULUM** in the Learning Center, to develop leadership and other skills in members and participants.

## INCREASE OUR ABILITY TO ADAPT



**HOLD INNOVATION FORUMS AND BRAINSTORMING SESSIONS** with club members and other participants to gather ideas for activities and service projects in the community. Contact other organizations or clubs that have a strong record of innovation or reinvention and look for ways to apply what they did to your own club.

**SET ASIDE A SMALL FUND** to try new ideas. Expand initiatives that succeed and document what you learn from those that don't.

**REVIEW YOUR CLUB ROLES, PROCESSES, AND TASKS** and look for ways to be more efficient — whether it's by reducing, combining, or eliminating responsibilities or using different technology.

**ESTABLISH A CONTINUITY PLAN**. Encourage club presidents, district governors, and other officers to work with the incoming leaders chosen for the next few years so that their efforts will be cohesive and all will be invested in a joint success.

**EXPLORE ROTARY'S ACTION PLAN:**  
[rotary.org/actionplan](https://rotary.org/actionplan)





[rotary.org/actionplan](https://rotary.org/actionplan)