Rotary Club Self-Evaluation of Performance and Operations

This form is to conduct a self-evaluation and review of your club's current performance and operations. It is NOT intended to "grade" your club, but rather provide a mechanism to discover the strengths of your club and identify areas that might be improved. Many questions will require a degree of reasonable appraisal. Please be guided by the Four Way Test and your best judgment in answering the questions.

Club Administration	Score
Please rate the following: $Yes=5 pts$ $No=0 pts$ $Don't Know = DK$	
1. Our Rotary Club has adopted the Club Leadership Plan.	
2. The club has written By-laws that are available to each member.	
3. The club Board of Directors meets on a regularly announced basis.	
4. The club has developed both a long-term and short-term plan of action.	
5. The club has a website or social media page with current information on it.	
6. The official Rotary International Directory is available to the members.	
7. The club publishes a roster listing the officers, members, committees and chairs.	
8. The club plans social events for members and partners throughout the year.	
9. The club makes an effort to contact absent or ill Rotarians	
10. The club has received a Presidential Citation within the last 3 years.	
11. The club has an annually prepared budget that is approved by the members.	
12. The club receives a financial report of all income and expenses at least once a year	•
Please Rate the Following: Excellent= 5, Good= 4, Satisfactory=3, Fair=2, Poor=1 Don't kn	iow= DK
13. The club meeting location site or area is	
14. The food provided during the meal at the club meeting is	
15. The quality of speakers and club programs are normally	
16. The meetings start and finish on time and the use of an agenda is	
17. The Board of Directors report to the club about their actions is	
18 The club's communication of important Rotary information to the members is	



19. The payment of club dues by the members in a timely fashion is
20. The payment of district and International dues in a timely fashion is
21. The information and content of the club newsletter/bulletin is
22. The club's use of sound systems, lecterns, decorations, flags, banners and other Rotary related items are
23. The operation of the club committee system with regards to meeting regularly and reporting to the board of directors and/or the membership is
24. The club's promotion of district assemblies, conferences, conventions and special meetings are
25. The club's use of RI Themes and knowledge of the RI President's message and initiatives are
26. The club's greeting and treatment of visiting Rotarians is
27. The special recognition given to visiting guests during club meetings is
28. The information and topics presented at a club assembly is
29. The club's treatment and reception of the District Governor's official visit is
30. Fellowship encouraged by the use of singing, "happy dollars," raffles, etc. is
31. The degree of Rotary spirit and friendly fellowship that exists in the club is
32. The club's efforts to recognize special individuals with "Rotarian of the Year", "Citizen of the Year", etc. is
33. The desire of the Rotarians to sit at a different table each week is
34. The club's recognition of special events, birthdays etc of the members is
Please rate the following:
35. Our club has a speaker at all meetings (5 pts), monthly (3 pts), never (0 pts).
36. The club newsletter is published for all meetings (5 pts), monthly (3 pts), none (0 pts).
37. The club holds regular <u>club assemblies</u> monthly (5 pts), quarterly (3 pts) semi-annually (1 pt), never (0 pts).
38. The Rotary International/ Club rules on attendance are always (5 pts), usually (4pts), occasionally (3 pts), seldom (2 pts), never (1 pt) enforced.
39. The club members are always (5 pts), usually (4 pts), occasionally (3 pts),

seldom (2 pts), never (0 pts) reminded to make-up for absences	
40. The club gives special recognition regularly (5 pts), occasionally (3 pts), once in a while (1 pt), never (0 pts) to individuals who have perfect attendance.	
41. My club has sponsored a District Governor candidate within the last 1-5 yrs (5pts), 6-10 yrs (4 pts), 11-15 yrs, (3pts), 16+ yrs (0 pts), don't know (DK).	
42. My club has provided an Assistant Governor (AG's) candidate within the last 1-5 yrs (5 pts), 6-10 yrs (3 pts), never (0), don't know (DK).	
43. The following number of <u>Rotarians</u> from my club attended the last Rotary International Convention- 5 + (5 pts), 3-4 (4 pts), 1-2 (2 pts), zero (0 pts), don't know (DK).	ıl
44. The following number of <u>Rotarians</u> from my club has attended the most recent district conference- 10 + (5 pts), 5-9 (4 pts), 2-4 (3 pts), 1 (2 pts), none (0 pts).	
45. The following number of <u>club leaders</u> attended the most recent district assembly- 5+ (5 pts), 2-4 (3 pts), 1 (1 pt), none (0 pts), don't know (DK).	
46. Generally 10 or more (5pts), 5-9 (3 pts), 1-4 (1 pt), no (0 pts), <u>Rotarians</u> from my club attends special functions (i.e. dinners, seminars, service events, celebrations, etc) sponsored by the district.	
47. The current president-elect always (5 pts), sometimes (3 pts), seldom (1 pt), never (0 pts) attends PETS (president-elect training seminar).	
Please add the totals points for questions 1-47 Club Administration Don't knows	
Membership	
Please rate the following:	
1. The average monthly club attendance figure is 90-100% (5 pts), 80-89% (4 pts), 70-79% (3 pts), 60-69% (2 pts), 50-59% (1 pt), don't know (DK)	
2. The <u>average age</u> of the club membership is 35-40 (5 pts), 41-50 (4 pts), 51-60 (3 pts), 61-70 (2 pts), 71 + (1 pt), don't know (DK).	
3. Last year, the club's membership-increased (5 pts), remained the same (3 pts), decreased (0 pts), don't know (DK).	
4. This year the club membership is likely to increase (5 pts), remain the same (3 pts), decrease (0 pts), don't know (DK).	
5. The club has sponsored a new club within the last 1-3 yrs (5 pts), 4-8 yrs (4 pts), 9-12 yrs (2 pts), longer or never (0 pts), don't know (DK).	
6. When a member relocates to another community, the club always (5 pts), sometimes (3 pts), never (0 pts) notifies the nearest Rotary club or RI of the move.	



7. New members are always (5 pts), sometimes (3 pts), never (0 pts) encouraged to become active in the club	
8. The club frequently (5 pts), often (4 pts), seldom (2 pts), never (0 pts) holds special membership drives (cocktail, wine & cheese parties, meet & greet, etc) to identify and attract potential new members.	
9. The club always (5 pts), sometimes (3 pts), seldom (1 pt), never (0 pts) has information or materials about joining Rotary at its fund raisers or events.	
Please rate the following: Yes= 5, No= 0, Don't know= DK	
10. The club has an active membership chair that makes regular reports to the club.	
11. The club has and uses a membership classification system.	
12. The club has developed a membership interest survey form.	
13. The club assigns new members to committees based on their interests.	
14. The club annually sets measurable and reasonable membership goals.	
15. The club has and uses a "Mentoring" program.	
16. The club has developed a welcoming package for new Rotarians.	
17. The club has a special program (red badge, greeter, etc.) to make new members feel welcome.	
18. The club conducts new member orientation meetings	
19. The club pays for new Rotarians to attend the Rotary Leadership Institute.	
20. The club conducts an "exit interview" to determine why members leave.	
21. The club systematically asks each new member for a referral.	
22. The club provides non-Rotarian speakers with information about Rotary.	
Rate the following: Excellent=5, Good=4, Satisfactory= 3, Fair=2, Poor=1, Don't know= DK	
23. The club's promotion of membership issues is	
24. The club's use of the classification list is	
25. The club membership balance and representation of the community business segments and general population are	
26. The club's attempts to invite qualified members of any race, gender or ethnic group to join the club is	



27. The club's new member orientation meetings are	_
28. The club's induction ceremony of a new member to the club is	_
29. The club's "mentoring" program is	
30. The club has a specific retention program that is	
31. The club's participation at district membership seminars is	
32. The effort to encourage <u>all members</u> to attend the Rotary Leadership Institute is	_
33. Overall, the club's efforts to attract and keep new members is	
Please add the total points for questions 1-33 Membership	
The Rotary Foundation	
Please rate the following: $Yes = 5$ $No = 0$, $Don't know = DK$	
1. The club has an active Foundation chair that makes regular reports to the members.	-
2. The club sets and achieves its Foundation giving goal each year.	_
3. The club encourages individuals to become Paul Harris Fellows on their own.	_
4. The club matches contributions made by members to the RI Foundation.	_
5. The club makes a special presentation of a new Paul Harris Fellowship	_
6. The club publicly posts a list of all the Paul Harris Fellows.	_
Please rate the following:	
7. Most (5 pts), many (4 pts) some (3 pts) few (2 pts) none (0 pts) of the club members understand that money given to The Rotary Foundation returns to the district for its use three years later	-
8. Information about The Rotary Foundation is provided to the club every month (5 pts), every three months (3 pts), every six months (1 pts) never (0 pts)	_
9. All (5 pts), most (4 pts), many (3 pts), some (2 pts), few (1 pt), none (0 pts) of the club members know about Paul Harris Fellows and how to become one.	_
10. All (5 pts), most (4 pts), some (3 pts), few (2 pts), none (0 pts) of the club members contribute each year to The Rotary Foundation under the Every Rotarian Every Year program. (EREY).	



11. My club has sponsored a VTT team member, a Peace Scholar or Water Scholar within the last 1-3 yrs (5), 4-6 yrs (3), longer or never (0 pts), don't know (DK).	_
12. My club has hosted a visiting VTT team member, or Peace or Water Scholar within the last 1-5 yrs (5 pts), 6-8 yrs (3 pts), longer or never (0 pts), don't know (DK).	_
13. My club has participated in a Global Grant with an international partner within the last 1-3 yrs (5), 4-6 yrs (3), longer or never (0 pts), don't know (DK).	_
14. My club has applied for a District Grant within the last 1 yr (5 pts), 2-3 yrs (3 pts), longer or never (0 pts), don't know (DK).	_
15. My club has applied for a Global Grant within the last 1 yr (5 pts), 2-4 yrs (3 pts), longer or never (0 pts), don't know (DK).	_
16. All (5 pts), most (4 pts), many (3 pts), few (2 pts), none (0 pts) of club members are Paul Harris Fellows (\$1,000 cumulative gift)	_
17. All (5 pts), most (4 pts), many (3 pts), few (2 pts), none (0 pts) of club members are Paul Harris Sustaining Members (\$100 gift per year commitment)	_
18. All (5pts), most (4 pts), many (3 pts), few (2 pts), none (0 pts) of club members are Bequest Society Members (\$10,000 gift in Will/Insurance)	_
19. All (5 pts), most (4 pts), many (3 pts), few (2 pts), none (0 pts) club members are Benefactors (\$1,000 gift in Will/Insurance)	
20. All (5 pts), most (4 pts), many (3 pts), few (2 pts) none (0 pts) of club members are Paul Harris Society Members (\$1,000 gift per year commitment)	_
21. Most (5 pts), many (4 pts), many (3 pts), few (2 pts), none (0 pts) of club members are Major Donors to The Rotary Foundation (\$10,000 cumulative gift)	
22. All (5 pts), most (4 pts), many (3 pts), few (2 pts), none (0 pts) of club's existing Paul Harris Fellows make subsequent contributions to The Rotary Foundation	_
Please add the total points for questions 1-22 Foundation Don't knows	
Service Projects	
Rate the following: Excellent=5, Good= 4, Satisfactory= 3, Fair= 2, Poor=1, Don't know= DK	
The club's attempts to promote vocational service are	
2. The promotion of the 4-Way Test in the club and community are	
3. The use of career development programs by the club in local schools to help students with career choices is	



4. The club's efforts to promote high ethical standards, professional dignity or service performance in the club and community are	
5. The club's effort to conduct one new community service project each year is	
6. The club's efforts to conduct one new international service project each year is	
7. The club's use of input, talents and resources of the members for service projects is	
8. The club's use of input, talent and resources from community leaders for service is	
9. I consider the club's activities regarding service, locally and internationally, to be	
10. The club has conducted an active program or project in the following areas	
Please credit 3 pts for each service project that your club has done within the last 3 years	
Drug use prevention or rehabilitation Polio eradication or other community immunization project Environmental activities Literacy projects Clean water programs Providing food for the hungry Assisting the community's handicapped or elderly Providing health or medical care locally or internationally Providing recreational opportunities for the community Helping the poor or needy of the community Improving the community's economic or social quality of life Conducting career opportunity programs Assisting or guiding the youth of the community Creating or supporting a Rotaract or Interact Club Working with other local service groups on a common project Work with other Rotary clubs on a common project Work with community educational facilities Traffic or highway safety programs or projects Animal safety or care programs Disaster assistance program or project Others	
Total points for question 10	
Please rate the following: $Yes = 5$ $No= 0$, $Don't know = DK$	
11. The club conducts various fund raisers to support its service programs.	
12. The club relies mainly on financial contributions from the members to fund its service programs.	
13. The club has participated in an International Service project within the last 2 years.	
14. The club participates actively in the Youth Exchange Program.	



15. The club regularly invites the local Youth Exchange students to its meetings.	
16. Club Rotarians routinely act as the host parents for the visiting Youth Exchange	
17. The club is aware of and planning to institute or cooperate with the mandated "Background Checks" for the Youth Exchange program.	
18. The club annually recognizes outstanding students or student leaders'	
19. The club sponsors at least 1 International Service project a year.	
20. The club participates in or recognizes the Rotary UN day at the United Nations headquarters.	
21. The club has participated within the last 3 years in a Rotary Friendship Exchange.	
22. Within the last 3 years, the club has participated in a Twin Cities, Sister Club, or Matched Club program with 1 or more Rotary clubs around the world.	
23. The club, within the last 3 years has sponsored a student(s) with a Rotary Youth Leadership Award (RYLA).	
Please add the total points for questions 1-23 Service Projects	
Don't knows	
Rotary Publicity and Public Relations	
Rotary Publicity and Public Relations 1. Our club always (5 pts), often (3 pts), seldom (1 pt) never (0 pts) has articles	
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8. Local Rotarians have been interviewed about the club on radio or TV within the last year.
9. Representatives from the media are active members of the club.
10. The club has a brochure describing the club and its projects available for handout.
11. The Rotary logo and club identification is visible for completed community service projects.
Please add the total points for questions 1-11 Rotary Public Relations Don't knows
Please forward the totals for all the questions to the last page
Bonus Questions 1. I receive the Rotarian magazine each month. (Y=5, N=0)
2. I have received or am familiar with the District Governor's e/newsletter. (Y=5 N=0)
3. I have brought in a new member to the club within the last 2 years. (Y=5 N=0)
4. I understand the SHARE System of The Rotary Foundation. (Y=5, N=0)
5. I am a Paul Harris Fellow or a Sustaining Member. (Y=5, N=)
6. I have worked on or contributed to service project within the last 2 years. (Y=5 N=0)
7. I visit the club, district or Rotary International websites daily (5 pts), weekly (4 pts) monthly (3 pts), occasionally (2 pts), never (0 pts)
8. I always (5 pts), sometimes (3 pts), never (0 pts) make-up for a missed meeting.
9. I, personally have served on a district committee within the last 1-5 yrs (5 pts), 6-10 yrs (3 pts), longer or never (0 pts).
10. I, personally attended the district conference or International convention within the last year (5 pts), 2-5 yrs (3 pts), longer than 5 yrs (1 pt), never (0 pts)
11. I have contributed to The Rotary Foundation within the last 1 year (5 pts), 2-3 years (3 pts) 4 years or more (1 pt), never (0 pts).
Please forward the total points for questions 1-11 to the last page total

Scoring

	Your score		DK's
Club Administration (47 questions)		out of 235 points	(38)
Membership (33 questions)		_ out of 165 points	(29)
The Rotary Foundation (22 questions)	Your score	out of 110 points	DK's (10)
Rotary Service (23 questions)		_ out of 173 points	(22)
Publicity & Public Relations (11 questions)		_ out of 55 points	(6)
Bonus Points (11 questions)		_out of 55 points	
Total points		_ out of 793 points	
Total Don't Knows (DK)		_ out of 105 questi	ons

Grand Total

- 700 points plus = Outstanding
- 600-699 points = Excellent
- 500-599 points = Very Good/Average
- 400-499 points = Could be improved
- 300-399 points = Caution-club may need assistance
- less than 300 points The club is in need of serious and immediate assistance

<u>Please do not make any adjustments to the total point final figure for the DK's.</u>. The following is for reference only.

1-10 DK's = 5 to 50 additional points - Normal

11-20 DK's = 55 to 100 points - Caution- should be concerned about the lack of knowledge about your club.

21-35 DK's = 105 to 175 points - Critical- you need to learn more about your club.

36 or more – **Unacceptable-** Unless you're a new member, you need to seriously learn more about the functioning of your club.

This is a non-weighted, unscientific analysis of your club and the results should only be used to identify areas that either you or the club might be lacking. It should not be taken as a negative reflection on the activities of the club or its Rotarians.

A "clean copy" of this survey for duplication is contained online at www.RLI33.org under the "Downloads" section.