

Rotary Club Self-Evaluation of Performance and Operations
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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.

1. 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 an e-mail address and/or web 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 know= 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 _____

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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 **weekly** (5 pts), **monthly** (3 pts), **never** (0 pts). _____
36. The club newsletter is published **weekly** (5 pts), **bi-weekly** (3 pts), **monthly** (1 pt), **none** (0 pts) . _____
37. The club holds regular club assemblies **monthly** (5 pts), **quarterly** (3 pts) **semi-annually** (1 pt), **never** (0 pts). _____
38. The Rotary International rules on attendance are **always** (5 pts), **usually** (4pts), **occasionally** (3 pts), **seldom** (2 pts), **never** (1 pt) strictly 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). _____

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- 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 Rotarians 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). _____
- 44. The following number of Rotarians 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 club leaders 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), Rotarians 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 _____

2. Membership **Score**

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 average age 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 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. _____

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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 _____

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31. The club's participation at district membership seminars is _____

32. The effort to encourage all members 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 _____

Don't knows _____

3. The Rotary Foundation **Score**

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 RI 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 the Paul Harris Fellowship and how to become one. _____

10. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of the club members contribute each year to the RI Foundation under the Every Rotarian Every Year program. (EREY). _____

11. My club has sponsored a GSE team member, an ambassadorial scholar, a university teacher or a peace 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 GSE team **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 applied for a Matching 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). _____

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- 14. My club has applied for a District Simplified 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 Rotary Volunteer Grant, Blaine Grant, or 3-H Grant **within the last 1 yr** (5 pts), **2-4 yrs** (3 pts), **longer or never** (0 pts), don't know (DK). _____
- 16. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club members are Paul Harris Fellows _____
- 17. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club members are sustaining Paul Harris members _____
- 18. **Most** (5pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club members are bequest donors to the RI Foundation. _____
- 19. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) club members are benefactors to the RI Foundation. _____
- 20. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts) **none** (0 pts) of club members are Paul Harris Society members _____
- 21. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club members are Major Donors to the RI Foundation. _____
- 22. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club's existing Paul Harris Fellows make subsequent contributions to the RI Foundation. _____

Please add the total points for questions 1-22 _____ **Foundation**

Don't knows _____

4. Service Projects _____ **Score**

Rate the following: Excellent=5, Good= 4, Satisfactory= 3, Fair= 2, Poor=1, Don't know= DK

- 1. 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 _____

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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 type 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 Rotoract 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 normally act as the host parents for the visiting Youth Exchange _____

17. The club is aware of and planning to institute the new mandated "Back Ground Checks" for the Youth Exchange program. _____

18. The club annually recognizes outstanding students or student leaders' _____

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- 19. The club sponsors at least 1 World Community Service project a year. _____
- 20. The club participates in 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 provided a student(s) with a Rotary Youth Leadership Award (RYLA). _____

Please add the total points for questions 1-23 Service Projects _____

Don't knows _____

5. Rotary Publicity and Public Relations **Score**

- 1. Our club **always** (5 pts), **often** (3 pts), **seldom** (1 pt) **never** (0 pts) has articles or pictures of our activities in the local media. _____
- 2. Our club **always** (5 pts), **often** (3 pts), **seldom** (1 pt), **never** (0 pts) uses the Public Access channels to promote or publicize our activities. _____
- 3. The members of the club **always** (5 pts), **often** (4 pts), **seldom** (1 pt), **never** (0 pts) wear their Rotary pins. _____
- 4. Our club has **many** (5 pts), **some** (3 pts), **one** (1 pt) **no** (0 pts) road signs at the entrances to the community announcing the day, time and location of our meeting. _____
- 5. When the club provides financial support to other organizations, it **always** (5 pts) **often** (4 pts), **seldom** (1 pt), **never** (0 pts) asks the other organization to publicize the donation in the local media. _____

Please rate the following: Yes= 5pts No= 0 pts Don't know=DK

- 6. Our club has a visible sign that "Rotary Meets Here" at our meeting site. _____
- 7. The club has used advertising (billboards, newspapers, community brochures, etc. within the last 2 years. _____
- 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 _____

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Don't knows _____

PLEASE FORWARD THE TOTALS FOR ALL THE QUESTIONS TO THE LAST PAGE

6. Bonus Questions **Score**

- 1. I receive and Read the Rotarian magazine each month. (Y=5, N=0) _____
- 2. I have received or am familiar with the District Governor's 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 RI 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 RI 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** _____

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Scoring

	<i>Your score</i>	<i>DK's</i>
1. Club Administration (47 questions)	_____ out of 235 points	_____ (38)
2. Membership (33 questions)	_____ out of 165 points	_____ (29)
3. The Rotary Foundation (22 questions)	_____ out of 110 points	_____ (10)
4. Rotary Service (23 questions)	_____ out of 173 points	_____ (22)
5. Publicity & Public Rel. (11 questions)	_____ out of 55 points	_____ (6)
6. Bonus Points (11 questions)	_____ out of 55 points	
Total points	_____ out of 793 points	
Total Don't Knows (DK)	_____ out of 105 questions	

How does your club fair?

700 points plus	=	Outstanding
600-699 points	=	Excellent
500-599 points	=	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 immediate assistance

Please do not make any adjustments to the total point final figure for the DK's.
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 -	Severe - Unless you have been in your club for less than a year, you should learn more about your club.

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

Additional Copies can be downloaded off the Rotary Leadership Institute Sunshine Division Web Site
www.rlittraining.org