

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 points No = 0 points Don't Know = DK

1. Our Rotary Club has adopted a Club Leadership/Action Plan _____
2. The club has written By-Laws that are available to each member _____
3. The club Board of Directors meet 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 web page and/or social media with current information on it _____
6. The club enters information into Rotary Club Central regularly _____
7. The club roster listing the officers, members, committees and chairs is up to date _____
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 achieved the Rotary 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 for 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 Rotary Information 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, or website is _____
22. The club's use of sound systems, lecterns, decorations, flags, banners and other Rotary related items is _____
23. Club committees meet regularly and report to the Board of Directors and / or membership as needed _____
24. The club's promotion of district assemblies, conferences, conventions and special meetings is _____
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 communicates with members **weekly** (5 pts), **bi-weekly** (3 pts), **monthly** (1 pt), **never** (0 pts) _____
37. The club holds club assemblies **monthly** (5 pts), **quarterly** (3 pts), **semi-annually** (1 pt), **never** (0 pts) _____
38. My club has sponsored a District Governor candidate within the last **1-5 years** (5 pts), **6-10 years** (4 pts), **11-15 years** (3 pts), **16+ years** (0 pts), **don't know** (DK) _____
39. My club has provided an Assistant Governor (AG) candidate within the last **1-5 years** (5 pts), **6-10 years** (3 pts), **never** (0 pts), **don't know** (DK) _____
40. The following number of Rotarians from my club attended the last Rotary International Convention: **5 or more** (5 pts), **3 to 4** (4 pts), **1 or 2** (2 pts), **zero** (0 pts), **don't know** (DK) _____

41. The following number of Rotarians from my club have attended the most recent District Conference: **10 or more** (5 pts), **5 to 9** (4 pts), **2 to 4** (3 pts), **1** (2 pts), **zero** (0 pts) _____
42. The following number of Club Leaders attended the most recent District Assembly: **5 or more** (5 pts), **2 to 4** (3 pts), **1** (1 pt), **none** (0 pts), **don't know** (DK) _____
43. Generally **10 or more** (5 pts), **5 to 9** (3 pts), **1 to 4** (1 pt), **no** (0 pts) Rotarians from my club attend special functions sponsored by the District (dinners, seminars, service events, celebrations, etc) _____
44. The President Elect **always** (5 pts), **sometimes** (3 pts), **seldom** (1 pt), **never** (0 pts) attends PETS (President Elect Training Seminar) _____

Please total your points for Club Administration questions 1 through 44 _____ Don't Knows _____

| 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 our club membership is 35-40 (5 pts), 41-50 (4 pts), 51-60 (3pts), 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 or satellite within the last 1-3 years (5 pts), 4-8 years (4 pts), 9-12 years (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 (0pts) holds special membership drives 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 raiser or events | _____ |

Please rate the following: Yes = 5 points No = 0 points 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 _____

Please 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 is 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 all members to attend Rotary Leadership Institute is _____

33. Overall, the club's efforts to attract and keep new members is _____

Please total your points for Membership questions 1 through 33 _____ Don't Knows _____

The Rotary Foundation

Score

Please rate the following: Yes = 5 points No = 0 points 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 Rotary Foundation _____

5. The club makes a special presentation for 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 (SHARE) _____

8. Information about The Rotary Foundation is provided to the club **every month** (5 pts), **every 3 months** (3 pts), **every 6 months** (1 pt), **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. **Most** (5 pts), **many** (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, global grant scholar, or peace scholar within the last **1 to 3 years** (5 pts), **4 to 6 years** (3 pts), **longer or never** (0 pts), **don't know** (DK) _____

12. My club has hosted a visiting VTT team within the last **1 to 5 years** (5 pts), **6 to 8 years** (3 pts), **longer or never** (0 pts), **don't know** (DK) _____

13. My club has applied for a Global Grant with an international partner within the last **1 to 3 years** (5 pts), **4 to 6 years** (3 pts), **longer or never** (0 pts), **don't know** (DK) _____

14. My club has applied for a District Grant within the **last year** (5 pts), **2 to 3 years** (3 pts), **longer or never** (0 pts), **don't know** (DK) _____

15. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **no** (0 pts) club members are Paul Harris Fellows _____
16. **Most** (5 pts), **many** (4 pts), **some** (3 pts) **few** (2 pts), **no** (0 pts) club members are Paul Harris Sustaining Members _____
17. **Most** (5 pts), **many** (4 pts), **some** (3 pts) **few** (2 pts), **no** (0 pts) club members are Bequest Society members of The Rotary Foundation _____
18. **Most** (5 pts), **many** (4 pts), **some** (3 pts) **few** (2 pts), **no** (0 pts) club members are Benefactors of The Rotary Foundation _____
19. **Most** (5 pts), **many** (4 pts), **some** (3 pts) **few** (2 pts), **no** (0 pts) club members are Paul Harris Society members _____
20. **Most** (5 pts), **many** (4 pts), **some** (3 pts) **few** (2 pts), **no** (0 pts) club members are Major Donors to The Rotary Foundation _____
21. **Most** (5 pts), **many** (4 pts), **some** (3 pts) **few** (2 pts), **none** (0 pts) of the club's existing Paul Harris Fellows make subsequent contributions to The Rotary Foundation _____

Please total your points for Foundation questions 1 through 21 _____ Don't Knows _____

Service

Score

Please 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 Four 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 efforts 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 points 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
- ___ Working with other Rotary Clubs on a common project
- ___ Working 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 points No = 0 points 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 meetings _____
- 16. Club Rotarians normally act as the host parents for the visiting student _____
- 17. The club is aware of and planning to institute or cooperate with the mandated background check for the Youth Exchange program _____
- 18. The club annually recognizes outstanding students or student leaders _____
- 19. The club participates in or recognizes the Rotary UN Day at the United Nations headquarters _____

20. The club has participated in a Rotary Friendship Exchange in the past 3 years _____
21. The club has participated in a Twin Cities, Sister Club or Matched Club program with one or more Rotary clubs around the world _____
22. The club within the last 3 years has sponsored at least one student with a Rotary Youth Leadership Award (RYLA) _____

Please total your points for Service questions 1 through 23 _____ Don't Knows _____

| | |
|---------------------|--------------|
| Public Image | Score |
|---------------------|--------------|

Please rate the following:

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 and/or social 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** (3 pts), **seldom** (1 pt), **never** (0 pts) wear their Rotary pins every day _____
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** (3 pts), **seldom** (1 pt), **never** (0 pts) asks the other organization to publicize the donation in the local media _____

Please rate the following: Yes = 5 points No = 0 points Don't Know = DK

6. Our club has a visible sign that reads "Rotary Meets Here" at our meeting site _____
7. The club has used advertising within the last 2 years (billboards, newspapers, radio, etc) _____
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 our club _____
10. The club has a brochure describing the club and its projects available for handout _____
11. The club has a website or social media accounts _____
12. The Rotary logo and club identification is visible for completed community service projects _____

Please total your points for Public Relations questions 1 through 11 _____ Don't Knows _____

Bonus Questions**Score***Please rate the following:*

1. I receive the Rotarian magazine each month Yes = 5 No = 0 _____
2. I have retweeted or reposted a Rotary social media post _____
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 Sustaining Member Y=5, N=0 _____
6. I have worked on or contributed to a 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 to 5 years** (5 pts), **6 to 10 years** (3 pts), **longer or never** (0 pts) _____
10. I personally attended the District conference or International convention within the **last year** (5 pts), **2 to 5 years** (3 pts), **longer than 5 years** (1 pt), **never** (0 pts) _____
11. I have contributed to The Rotary Foundation within the **last 1 year** (5 pts), **2 to 3 years** (3 pts), **4 years or more** (1 pt), **never** (0 pts) _____

Please total your points for Bonus questions 1 through 11 _____ Don't Knows _____