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

<table>
<thead>
<tr>
<th>Please rate the following: Yes= 5 pts  No=0 pts  Don’t Know = DK</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Our Rotary Club has adopted the Club Leadership Plan.</td>
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<tr>
<td>2. The club has written By-laws that are available to each member.</td>
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<tr>
<td>3. The club Board of Directors meets on a regularly announced basis.</td>
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<td>4. The club has developed both a long-term and short-term plan of action.</td>
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<td>5. The club has a website or social media page with current information on it.</td>
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<td>6. The official Rotary International Directory is available to the members.</td>
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<td>7. The club publishes a roster listing the officers, members, committees and chairs.</td>
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<tr>
<td>8. The club plans social events for members and partners throughout the year.</td>
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<td>9. The club makes an effort to contact absent or ill Rotarians</td>
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<tr>
<td>10. The club has received a Presidential Citation within the last 3 years.</td>
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<td>11. The club has an annually prepared budget that is approved by the members.</td>
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<tr>
<td>12. The club receives a financial report of all income and expenses at least once a year.</td>
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</tbody>
</table>

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 _______

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 club assemblies 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 (4 pts), 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 (5 pts), 6-10 yrs (4 pts), 11-15 yrs, (3 pts), 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 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

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 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 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 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 _______

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 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. 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 1-5 yrs (5 pts), 6-8 yrs (3 pts), longer or never (0 pts), don’t know (DK). ____

15. My club has participated in 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 (5 pts), 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

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 ________

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

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 __________  
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

<table>
<thead>
<tr>
<th>Section</th>
<th>Score</th>
<th>DK’s</th>
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<tbody>
<tr>
<td>Club Administration (47 questions)</td>
<td>_______ out of 235 points</td>
<td>______ (38)</td>
</tr>
<tr>
<td>Membership (33 questions)</td>
<td>_______ out of 165 points</td>
<td>______ (29)</td>
</tr>
<tr>
<td>The Rotary Foundation (22 questions)</td>
<td>_______ out of 110 points</td>
<td>______ (10)</td>
</tr>
<tr>
<td>Rotary Service (23 questions)</td>
<td>_______ out of 173 points</td>
<td>______ (22)</td>
</tr>
<tr>
<td>Publicity &amp; Public Relations (11 questions)</td>
<td>_______ out of 55 points</td>
<td>______ (6)</td>
</tr>
<tr>
<td>Bonus Points (11 questions)</td>
<td>_______ out of 55 points</td>
<td></td>
</tr>
<tr>
<td><strong>Total points</strong></td>
<td>_______ out of 793 points</td>
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<tr>
<td><strong>Total Don’t Knows (DK)</strong></td>
<td>_______ out of 105 questions</td>
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</table>

**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

*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 – **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](http://www.RLI33.org) under the “Downloads” section.*