



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 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 _____
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 _____



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 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. **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 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). _____
- 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 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 Paul Harris Sustaining Members _____
- 18. **Most** (5pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) of club members are bequest donors to The Rotary Foundation. _____
- 19. **Most** (5 pts), **many** (4 pts), **some** (3 pts), **few** (2 pts), **none** (0 pts) club members are benefactors to The Rotary 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 Rotary 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 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. _____



- 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 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

	<i>Your score</i>	<i>DK's</i>
Club Administration (47 questions)	_____ out of 235 points	_____(38)
Membership (33 questions)	_____ out of 165 points	_____(29)



The Rotary Foundation (22 questions)	_____ out of 110 points	_____ (10)
	<i>Your score</i>	<i>DK's</i>
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 questions	

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 under the "Downloads" section.