



Our club has an active committee for this function that supports our needs as an effective club. (Active = meets at least monthly, has written goals and is making progress toward these goals, gives regular reports to club members)

- Administration
- Membership
- Public relations
- Service
- The Rotary Foundation
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- Our board of directors receives club committee reports monthly
- Our board and committees provide reports at club meetings on a monthly average (6 since 1 July)
- Our club has amended our bylaws to reflect actual structure and practices
  - All members have reviewed bylaws
  - All members have been given the opportunity to suggest changes
  - All members can easily access the bylaws
- Our club has developed/implemented a long-range/strategic plan with goals for the next three to five years (including service, membership, The Rotary Foundation, public image, administration, and leadership development)
- Our club set annual goals using the planning indicators in Rotary Club Central; goals for 2014-15 support the club's long-range plan.

Source: *Rotary Club Central at www.rotary.org*

- Our club enters progress reports for goals into Club Central a minimum of quarterly (2x since 1 July)
- Our club applied for the Presidential Citation within the last 3 years.
  - Our club received Presidential Citation within the last 3 years.
- Our club held a program on use of Club Central to ensure members can stay to date on club progress
- Our club pays its RI and district dues on time without outside assistance
  - Our members pay dues on time
- Our club makes decisions and takes action consistent with Rotary philosophy and policies
- Our club has a regular monthly schedule for Board of Director's meetings and announces the meetings to club members in advance
- Our club has an annual budget that has been approved by members
- Our club provides a financial report of income and expenses to members at least once a year
- Our club completed elections of the president, board members and committee chairs for 2015-16, and has reported officers on rotary.org and D5040 ClubRunner by 31 December

## Additional Comments

## Possible Action(s)

### MEETINGS

- Our club meets weekly except for recognized holidays.
- We have a speaker or other program at each meeting
- Our club has high quality, relevant and interesting speakers and programs  
We devoted \_\_\_\_ programs to a Rotary topic since 1 July
- Our club appointed a committee that plans and schedules engaging programs
- Our meetings start and finish on time and follow a planned agenda
- We have a special club process to make guests and visiting Rotarians feel welcome
- Our president discusses club goals and priorities weekly from the podium
- Our club plans and holds varied fun activities during weekly meetings at least once a month
- Our club actively promotes attendance at district assembly, conference and events, and the International convention at least monthly
- Our president emphasizes the RI theme, the RI President's message and D5040 Governor's priorities at least monthly from the podium
- We held a special event or meeting this year during the District Governor's official visit
- Our club holds assemblies at least quarterly (two or more since 1 July 2014)
- We presented a program to members within the past 12 months about features and use of Rotary.org
- Our club specially recognizes Rotarians who have perfect attendance at least semi-annually
- Our president or other board member reminds members weekly about make ups from the podium
- Our club meetings are well attended

Attendance YTD (July to December) is \_\_\_\_\_ %  
Attendance for the 2013-14 year was \_\_\_\_\_

*Source: club secretary records, ClubRunner*

## Additional Comments

**Possible Action(s)**

**SERVICE**

- Our club has a diverse range of interesting service opportunities available for members' participation  
\_\_\_\_\_ Number of hands-on service opportunities offered to members since 1 July  
\_\_\_\_\_ % club members participating in hands-on service since 1 July  
  
Number of active service projects this Rotary year  
\_\_\_\_\_ Community  
\_\_\_\_\_ International
- We conducted a community assessment to identify possible new service projects during the past 18 months  
\_\_\_\_\_ Number of new club service projects implemented since July 2013
- Our club reviewed ongoing service projects during the past 18 months to assess need, relevancy and interest to club members  
\_\_\_\_\_ Number of projects phase out since July 2013 due to lack of interest/relevancy
- We rely primarily on financial contributions from members to fund service programs
- Our club raises sufficient funds annually from external sources to meet project funding needs  
\$\_\_\_\_\_ Funds raised since 1 July 2014 to support service projects
- Each of our members has been involved in at least one of the club's service projects in the past 12 months
- Our club regularly recognizes members who participate in and provide leadership to service projects

Our club conducted an active program or project in the following areas within the past 3 years:

- Assisting or guiding the youth of the community
- Assisting the community's handicapped or elderly
- Clean water programs
- Conducting career opportunity programs
- Creating or supporting a Rotaract or Interact Club
- Disaster assistance program or project
- Drug use prevention or rehabilitation
- Environmental activities
- Helping the poor or needy of the community
- Improving the community's economic or social quality of life
- Literacy
- Polio eradication or other community immunization project
- Providing food for the hungry
- Providing health or medical care locally or internationally
- Providing recreational opportunities for the community
- Work with community educational facilities
- Work with other Rotary Clubs on a common project
- Work with other local service groups on a common project
- Other \_\_\_\_\_
  
- Our club currently hosts a Youth Exchange student
  - The student regularly attends club meetings/events
  - Our members serve as host parents for Youth Exchange students

- Our club sponsored one or more students to RYLA in 2014
- Members took part in a Rotary Friendship Exchange within the past 24 months
- Our club participated in Rotaract or Interact activities since 1 July

**Additional Comments**

**Possible Action(s)**

## COMMUNICATION

- Our club implemented a structured communication plan to inform members about club activities and other news
- We have a newsletter and website that is useful and interesting to members
- Our web page is updated with new information at least twice monthly
- Our club has an active Facebook page with 3 or more communications weekly
  - Members connect their non-Rotarian friends to the club's Facebook page
- We publish a newsletter (online or hard copy) monthly and provide it to all members in a way they can easily access it
- Our club communicates important news and information from Rotary and the district to all members within a week of its arrival
- We published a 2014-15 club directory that is easily accessible to all members which lists the board of directors, committees and members
- Our members know about the official Rotary International Directory and we make it accessible to all at our meetings

**Additional Comments**

**Possible Action(s)**

## FELLOWSHIP

- We promote fellowship at each weekly meeting through happy dollars, raffles, singing, games or similar activities
  - Meetings include planned time for networking and socializing.

- Our club conveys a feeling of Rotary spirit, friendship and energy to members and guests when arriving in the meeting room
- Our club plans techniques to “mix” Rotarians who consistently sit together during weekly meetings
- We hold 4 or more social events throughout the year (2 held since 1 July)
  - Members provide input on social activities and events
  - Activities and events include family members
- We recognizes special achievements, birthdays or important events of the members
  - There is a committee that coordinates these recognitions
- Our club board contacts absent or ill Rotarians weekly and personally make a call if the Rotarian missed 2 or more meetings
- Our club appointed a social committee that implements social and other fellowship events of interest to members.
- Our club resolves disagreements amicably, using the “Spirit of Rotary”

**Additional Comments/Description**

**Possible Action(s) Needed**

**DISTRICT & ROTARY INTERNATIONAL**

- Our club welcomes district leaders to attend the meetings
- Our leaders have a good working relationship with the Assistant Governor
- Our club asks district leaders and/or Rotary International for help and resources regularly, and acts on those recommendations

**Additional Comments**

**Possible Action(s)**

**MEMBERSHIP**

- Club is satisfied with the current number of active members

**Member Snapshot**

Number of active members today \_\_\_\_\_  
Number of active members on 30 June 2014 \_\_\_\_\_  
Number of active members on 1 July 2009 \_\_\_\_\_  
Number of new members inducted since 1 July 2013 \_\_\_\_\_  
% of members proposing those new members \_\_\_\_\_ %  
Number of members leaving the club since 1 July 2013 \_\_\_\_\_

Source: club records; rotary.org, Rotary Club Central, My Club tab, Reports; also see two reports sent with this assessment

**Active Member Profile**

- Our club reflects the community in its membership mix
  - Profession
  - Age
  - Gender
  - Ethnicity

Number of male members \_\_\_\_\_  
Number of female members \_\_\_\_\_

Number/% in the following age categories:

30 or under \_\_\_\_\_ %  
31 to 40 \_\_\_\_\_ %  
41 to 50 \_\_\_\_\_ %  
51 to 60 \_\_\_\_\_ %  
61 to 70 \_\_\_\_\_ %  
71 or over \_\_\_\_\_ %

Membership tenure (number/%)

Under 1 year \_\_\_\_\_ %  
1-2 years \_\_\_\_\_ %  
3-5 years \_\_\_\_\_ %  
6-10 years \_\_\_\_\_ %  
11-25 years \_\_\_\_\_ %  
Over 25 years \_\_\_\_\_ %

- Our club annually sets measurable membership attraction and retention goals.
- We set a goal for number of members on 30 June 2015  
The goal is \_\_\_\_\_
- We set a retention goal for 2014-15  
The goal is \_\_\_\_\_
- We have a written membership plan for 2014-15 that includes engagement, retention and attraction strategies
- Our club appointed a committee chair experienced/trained in these techniques
  - The committee is active and makes regular reports to the club
- Our club conducts an "exit interview" to determine why members leave and takes action on results

- We have implemented a system for motivating and engaging all members in the club.
  - All members have been appointed to a committee
  - All members are involved in a service project
  - New members have been assigned activities/committees based on their interests within 30 days after induction
- Our club conducts both pre-induction and post induction orientations for new members
- We have a welcome/information package for new Rotarians
- Our club holds a formal induction ceremony/celebration for new members
  - It includes family members and/or work colleagues
- We assign an experienced Rotarian mentor to every new club member
- We have a planned education program for members during the 1<sup>st</sup> year of membership
- Our club recognizes Rotarians who sponsor new members within 30 days of the induction
- Our club notifies the nearest Rotary club when a member relocates

Our club possesses the following attributes that attract new members:

- 1.
- 2.
- 3.

These obstacles need to be addresses so our club can be more effective in:

Attracting new members

Retaining current members

- 1.
- 2.
- 3.

- 1.
- 2.
- 3.

**Additional Comments**

**Possible Action(s)**

**PUBLICITY AND PUBLIC RELATIONS**

- Our club has written public image goals and plan for 2014-15
- Our club appointed a committee chair experienced/trained in these techniques
- Our members wear their Rotary pins daily (at the meeting and in other daily activities)
- Our club has had an article(s) or photo(s) of our activities in the local media within the past 12 months

- We maintain a visible sign that "Rotary Meets Here" at our meeting site
- We have road signs announcing the day, time and location of the meeting
- Our club always asks community organizations we support to publicize the donation in the local media and assists, as needed, to ensure completion
- Our club has placed advertising (PSAs, billboards, newspapers, movie theaters, etc.) within the last 24 months.
- Our club supports a website specifically designed to communicate to potential members and the external public
- We ensure the Rotary logo and club identification is clearly visible in all completed service projects.
- The media about Rotary or a club project has interviewed our members within the past 12 months
- We have one or more media representatives as active club members
- Our club has developed a brochure and/or other current publicity materials describing the club, its projects and benefits of getting involved, and distributes it regularly in the community
- We use the new Rotary logo and image materials
- Our club conducts a public awareness program targeting the business and professional community to increase awareness about Rotary and what it does

**Additional Comments**

**Possible Action(s)**

**LEADERSHIP & DEVELOPMENT**

- Our club has had difficulty in finding a president during the past 5 years  
 \_\_\_\_\_ Number of years this has occurred  
 \_\_\_\_\_ Number of current club members who have served as president 2 or more times
- We have a structured process to identify future club leaders and implement a development plan for these Rotarians  
 \_\_\_\_\_ Number of current club members who attended one or more RLI sessions since 1 July 2013  
 \_\_\_\_\_ Number of current members who have attended all 3 segments of RLI  
 The club pays for new Rotarians to attend the Rotary Leadership Institute.
- Our club uses a system to ensure continuity in leadership, including officers, committees, and long-term service projects  
 It includes:
  - Succession planning
  - Documentation of procedures
  - Decision making

- Identifies potential future district leaders and notifies the district leadership annually
- Provided names for an Assistant Governor or other district chair/officer to the district within the last 2 years
- Members have served in a Rotary position beyond the club level during the past 2 years

Club members attending district and international rotary events or programs in the past 12 months:

- District 5040 conference. Number: \_\_\_\_\_
- District Assembly. Number: \_\_\_\_\_
- Rotary International Convention. Number: \_\_\_\_\_
- Other district seminars or workshops (other than RLI). Number: \_\_\_\_\_

- Our president attended PETS in 2014 and the PE will attend in 2015

**Additional Comments**

**Possible Action(s)**

**THE ROTARY FOUNDATION**

- Our club annually prepares goals and a written plan for Foundation support and program participation
- We set a goal for Annual Fund (AF) contributions for 2014-15  
The goal is \$\_\_\_ (overall) \$\_\_\_ per capita
- Club members have contributed to the Annual Fund since 1 July 2014  
We've had the following contributions to AF for 2014-15 YTD  
\$\_\_\_ (overall) \$\_\_\_ per capita  
  
\_\_\_ % of current club members are Paul Harris Fellows  
\_\_\_ % of club members are Sustaining Members  
\_\_\_ % of active members who contributed since 1 July
- A majority of active members contributed to the Annual Fund in 2013-14  
\_\_\_ % of active members who contributed to The Rotary Foundation (Every Rotarian Every Year)  
  
Our club had the following contributions to AF for 2013-14  
\$\_\_\_ (overall) \$\_\_\_ per capita

*Source: rotary.org (Manage, Club & District Administration, Reports; Foundation Contributions & Recognition); Club Central, Rotary Foundation tab, Reports; also see report sent with this assessment*

- We have an active Foundation chair and committee that understands the programs of The Rotary Foundation, are promoting its financial support and makes regular reports to the members
- Our club recognizes members' financial contributions to The Rotary Foundation and participation in Foundation programs several times a year
- We encourage each club member to make a gift each year to the Annual Programs Fund

- Our club invites Foundation program participants and alumni to become involved in club meetings, programs and activities
- We hold a meeting program at least quarterly about The Rotary Foundation's humanitarian work and inform members about international service opportunities
- Our members understand the relationship between Foundation giving and Foundation programs
- We publicize a list of the club's Paul Harris Fellows quarterly
  - Members understand how to become a Paul Harris Fellow
- Our club has applied for a Foundation Grant within the past 3 years

**Additional Comments/Description**

**Possible Action(s) Needed**

***Reminder: those attending the workshop should also complete and return the Rotarian's Individual Questionnaire by January 8.***