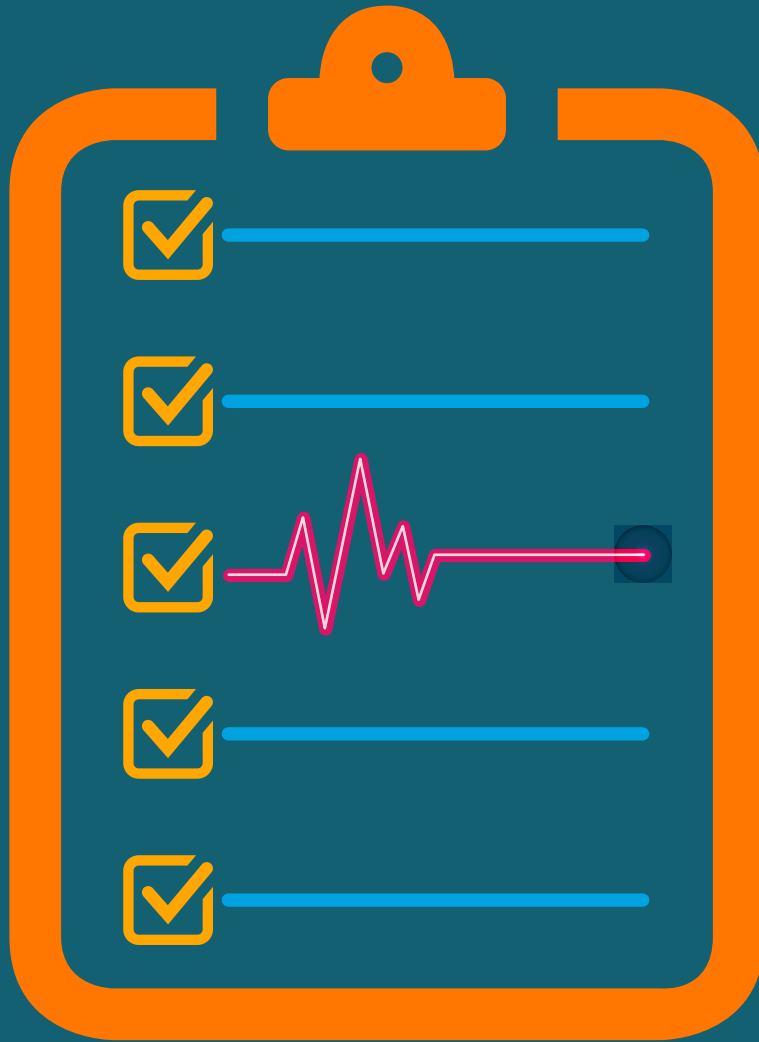




CLUB HEALTH CHECK

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies. This resource is intended to help club leaders assess their clubs. In using it, you're taking a step to maintain your club's health and preserve its value for members and the community. Mark the boxes next to the statements you consider to be true, based on the past 12 months. Then discuss the results with your fellow club officers. If you left more than five of the boxes in any section blank, that area should be addressed. Act on the suggested remedies for any problem areas you've identified.

YOUR CLUB EXPERIENCE



Members who have a positive club experience are more likely to stay. In turn, they create a positive experience for others, because their enthusiasm is contagious. If your club's members genuinely enjoy being a part of the club, you're on the right path. Your experience includes not just your club meetings and other activities, but also the connections you've made and your pride in Rotary's work.

- ☐ I look forward to attending club meetings and other club activities.
- ☐ Our club meeting programs are relevant, interesting, and varied.
- ☐ We have a greeter or greeters who welcome members and visitors to meetings.
- ☐ Our meetings are organized and are run professionally.
- ☐ Members make an effort to meet and talk with different people at each meeting.
- ☐ I've made several new friends in the club.
- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.
- ☐ We are inclusive in who we invite to our club, how we welcome guests, the topics we discuss, and the service we focus on.
- ☐ Members other than club leaders participate in Rotary events at the district or international level.
- ☐ Most members are aware of Rotary's Avenues of Service and areas of focus, take part in projects, and feel proud to be a part of the club.
- ☐ We raise funds in a way that allows members to contribute what they wish.
- ☐ We recognize members' service, engagement, and donations by nominating them for and presenting them with awards.
- ☐ I have made international connections through Rotary.
- ☐ Guests are asked to introduce themselves and are invited back.
- ☐ We provide members with flexible meeting opportunities (attending virtually or in person or watching recordings if they miss a meeting).

COMMENTS

**SEE THE NEXT PAGE FOR YOUR
PROGNOSIS AND REMEDIES**





If members are not having a good experience, your club is at risk of losing them. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	+ Try something new at a meeting. For example, show one of these inspirational speeches and have a discussion afterward. + Hold online meetings when in-person meetings aren't feasible, or allow some members to connect virtually and others to attend in person. + Find a skilled person in the club or district who can facilitate and run online meetings. + Contact your Club and District Support representative or your regional membership officer for ideas.
Rotary experience beyond the club	+ Sponsor another Rotaract or Rotary club. + Start or get involved in an Interact program. + Connect members to Rotary's various programs. Sponsor an Interact club, organize a RYLA event, create a scholarship, or start an exchange. + Remind members that they can join a Rotary Fellowship or Rotary Action Group. + Promote district events that are open to all members. Have someone who has attended in the past talk about the experience. + Promote the work that Rotary and Rotaract do both globally and locally, including polio eradication. + Work with your local Toastmasters club to build leadership and communication skills among members. + Visit other clubs to connect with new people and see what they're doing that your club could try.
Unmet expectations	+ Find out what experience your members want to get out of your meetings by using the Member Satisfaction Survey, and then give them that experience. + Encourage members to develop leadership skills by taking online courses developed by Toastmasters International.

SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons members join and stay involved in Rotary. The healthiest clubs vary their activities and offer a number of ways to get involved. Try a new kind of social event or a different service experience and watch the impact it has on your club.

- ☐ Our club holds regular get-togethers (in addition to club meetings) for socializing and networking.
- ☐ Our club encourages members to bring partners, spouses, friends, and family members to club meetings and events.
- ☐ Our club offers members leadership opportunities and professional development.
- ☐ Our club invites members of the Rotary family (such as Interactors, Rotary Youth Exchange students, and Rotary Peace Fellows) to participate in meetings and events.
- ☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Rotary Youth Exchange student, is involved with New Generations Service Exchange, or organizes a Rotary Youth Leadership Award (RYLA) event.
- ☐ Our club has direct communication with partners, friends, and alumni.
- ☐ We consult community leaders and community members to determine needs before choosing a project.
- ☐ We visit My Rotary Discussion Groups, attend project fairs, or consult The Rotary Foundation Cadre of Technical Advisers to look for ideas and partners before we choose a new project.
- ☐ Our club has a service project in progress.
- ☐ All members can give input, such as their vocational expertise, on service and social activities.
- ☐ Our club service projects align with Rotary's areas of focus.
- ☐ Our club has applied for or used Rotary Foundation grant funds for a service project.
- ☐ At least one member of our club attends a Rotary Foundation grant management seminar each year.
- ☐ Our club contributes to The Rotary Foundation.
- ☐ Our club has a Rotary Foundation committee chair and a service projects committee chair.

COMMENTS



Clubs that have inadequate social or service opportunities are at risk of losing members who don't feel connected or empowered. The good news is that these deficiencies can be remedied in fun and rewarding ways. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	+ Sponsor an Interact club, organize a RYLA event, create a scholarship, start an exchange, join a Rotary Action Group, or support the Rotary Peace Centers. + Let members know about Rotary's exchange programs.
Quality of projects	+ Use Community Assessment Tools and A Guide to Global Grants to improve the quality of your projects. + Connect with your Cadre advisers to get guidance on service projects. + Evaluate your club's service projects to determine if repeating them is worth the effort.
Social activities	+ Put one or two members in charge of organizing socials throughout the year. + Join a Rotary Fellowship. + Find or create a variety of events with different times or formats.
Leadership	+ Help your members develop and practice their leadership skills. Promote the Learning Center's professional development catalog. + Give new and young members leadership roles.

MEMBERS



A healthy club is one that is growing and changing. Having members with diverse perspectives and backgrounds will fuel innovation and give your club a broader understanding of your community's needs. Pay attention to how your members are feeling about the club. Research shows that one of the most common reasons members leave is that club leaders are not open to new ideas. Involving members and giving them a voice in their club's future will strengthen both the club and members' commitment to Rotary. Consult your club's membership profile in Rotary Club Central for the most recent statistics.

- ☐ Our club has had a net increase in members in the past year.
- ☐ Our club has had a net increase in members who represent diverse groups.
- ☐ Our club represents the racial or ethnic diversity of our community.
- ☐ Our club seeks to attract members from professions in the community that are underrepresented in the club.
- ☐ New members are officially inducted and are given an orientation, informational materials, and opportunities to get involved.
- ☐ Our club actively engages Rotary alumni (former Rotaractors, Rotary Youth Exchange students, Rotary Peace Fellows, and participants of other Rotary programs).
- ☐ Our club shows its appreciation of each member's unique contributions.
- ☐ Our club retains at least 90% of its members each year.
- ☐ At least 75% of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
- ☐ A designated person checks and follows up on membership leads assigned to our club.
- ☐ Member benefits are explained and promoted to new and continuing members.
- ☐ Newer and seasoned members are paired for mentoring relationships.
- ☐ We ask members to speak at meetings about their vocations or other topics of interest.
- ☐ Our club has a membership committee whose chair and members are dedicated to attracting and engaging club members.
- ☐ Members attend district events and seminars on Rotary topics that interest them.

COMMENTS



Clubs that have deficiencies in membership are at risk of becoming outdated, dull, and less valuable to their members and community. Fortunately, there are many tools available that are proven to give results. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	+ Attract a wide array of members by using Diversifying Your Club: A Member Diversity Assessment. + Learn about Rotary's Commitment to Diversity, Equity, and Inclusion and related efforts.
Professional diversity	+ Expand the skill sets of your members by recommending professional development courses.
Stagnant or declining membership	+ Create a membership development plan. + Learn how to connect to prospective members and manage your membership leads in one place. + Target prospective members using this exercise. + Teach members your club's process for proposing new members and explain that they can also refer qualified prospects to other clubs. + Make sure that members are aware of all the ways they can be involved with Rotary besides through attending club meetings.
Members leaving	+ Start with the Enhancing the Club Experience: A Member Satisfaction Survey to improve current members' experience. + Learn and act on trends using the Improving Your Member Retention: A Retention Assessment and Analysis. + Use the exit survey in Understanding Why Members Leave to consider the reasons your club can address. + Let resigning members know they can rejoin or change clubs when they are ready and stay in touch in the meantime. + Encourage Rotaractors to consider dual membership.
Orientation and Rotary knowledge	+ Offer new member orientation, professional development, and ongoing learning opportunities from Rotary's Learning Center.

IMAGE



Clubs that have fun and make an impact are more enjoyable for members and more attractive to potential ones. A positive public image improves your club's relationship with the community and prospective members. Make sure your club is getting credit for the service it provides. Demonstrating that your club meets real needs confirms your value to your community.

- ☐ We have a public-facing, visually appealing club website that explains what the club does, who its members are, and the benefits of membership.
- ☐ We have social media accounts that show our followers the difference we make in our community.
- ☐ Our social media accounts reach a range of audiences.
- ☐ Our club appeared in the local media several times last year.
- ☐ We promote our club and Rotary through various media in the community (television, radio, billboards, etc.).
- ☐ Our club invites members of the media to cover our service work.
- ☐ Our club materials follow Rotary's brand guidelines.
- ☐ We use materials and templates from Rotary's Brand Center that show our members as people of action.
- ☐ We use marketing materials from Rotary International, such as public service announcements, videos, images, and logos.
- ☐ We display Rotary or Rotaract signs and banners at our meeting place, service project sites, and events.
- ☐ Our club's presence is known in our community.
- ☐ The club brochure we give to community members and prospects shows the impact we make.
- ☐ Our club has members who have marketing expertise.
- ☐ We build Rotary's public image by making sure our guests and the public have positive experiences with our club.
- ☐ Our club has a public image committee whose chair and members are dedicated to public image and outreach.

COMMENTS



Clubs that don't have a visible presence in their community are at risk of minimizing their impact or being perceived as irrelevant. Rotary has resources that can help. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	+ Find resources in Rotary's Press Center and use them in your community's media. + Plan events to raise community awareness of Rotary. Use the events guide in Rotary's Brand Center.
Outdated materials	+ Find editable club brochures and membership materials in Rotary's Brand Center. + Follow the Visual and Voice Guidelines in any materials your club creates. + Use Rotary videos and images of your members in your materials.
Online presence	+ Find a member with the skills and time to create and manage your club website and social media pages. + Take the course The Rotary Brand in the Learning Center. + Use Rotary videos and images and videos of your own members. + Use Rotary's Social Media Toolkit to update your digital presence.
Marketing expertise	+ Find tips in Club Public Image Committee Basics and put members with public relations expertise on the committee. + Recruit professionals with marketing expertise using ideas from Finding New Club Members: A Prospective Member Exercise. + Refresh your club's social media presence using the Social Media Toolkit in Rotary's Brand Center.

BUSINESS AND OPERATIONS



When your club runs smoothly, it's likely that you have good leaders who are thinking about the club's future. The leaders shape the club, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development, strategic planning, and succession planning are also ways to fortify your club.

- ☐ Our club has a strategic plan that we update regularly.
- ☐ We set annual goals and enter them in Rotary Club Central.
- ☐ Our club strives for and often earns the Rotary Citation.
- ☐ Our club board meets at least quarterly to review our strategic plan, measure our progress toward goals, and adjust bylaws and other documents as needed.
- ☐ Our club board changes what isn't working well and updates club bylaws accordingly.
- ☐ We have a process for ensuring continuity that includes identifying future club leaders and preparing them for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
- ☐ Our club president attends the presidents-elect training seminar (PETS), and club leaders attend the district training assembly.
- ☐ Club leaders use My Rotary or integrated club management software to conduct Rotary business.
- ☐ Our club elects incoming officers by 31 December and reports them to Rotary International no later than 1 February.
- ☐ Our club secretary reports new members within 30 days after they join.
- ☐ Our club sets and approves a budget for the upcoming Rotary year, designates a treasurer, and keeps separate bank accounts for administration and fundraising or project funds.
- ☐ Our club sets and achieves fundraising goals using a variety of fundraising activities.
- ☐ We ask our members to complete a member satisfaction survey each year and use the results to shape the club.
- ☐ More than half of our club's members have a My Rotary account.
- ☐ Our club has a club administration committee chair.

COMMENTS



Clubs that don't have skilled members in leadership roles or that neglect members' needs risk becoming ineffective and obsolete and losing their members as a result. There are plenty of remedies for clubs that want to thrive. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	+ Create a vision for your club and set long-range and annual goals using the Strategic Planning Guide. + Strive to achieve more than half of the goals in Rotary Club Central to earn the Rotary Citation. + Rotaract clubs should use the Citation Goals and Instructions worksheet. + Select goals that are meaningful not just to the club's board but to the club as a whole. + Use Strengthening Your Membership to make a membership development plan.
Innovation	+ Update your club bylaws to include new membership types, such as family memberships. + Review the Club Types, Formats, and Models resource to review the experience your club strives to offer its members.
Processes	+ Develop standard processes for inducting and orienting new members, following up with prospective members, proposing a new member, leadership continuity, etc. + Use the member satisfaction survey.
Leadership	+ Find tips and resources in online learning plans for club leaders. + Offer leadership development opportunities and promote self-paced learning with Rotary's online professional development courses.
Managing funds	+ Take the Club Rotary Foundation Committee Basics online course to learn about giving options. + Find best practices in Club Treasurer Basics.
Managing your club on MyRotary	+ Use the Club Administration section of My Rotary to get reports; add, edit, or remove a member; pay your club invoice; and track your membership leads. (Note: For Rotaract, only club presidents can use the Club Administration page on My Rotary.)

WHAT'S NEXT?



Using the Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most marks and which had the fewest. Look at the suggested remedies and take action. When you visit your doctor, you may get advice about maintaining your good health or possibly a prescription or two to combat an ailment. If you don't follow the advice or take the prescriptions, you aren't making the most of your visit. Similarly, to make the most of your club health check, use the suggested resources to treat your problem areas.

Paul Harris said, "May our happiness increase with our usefulness." As our communities and their needs change over time, clubs have to adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

NEXT STEPS

1. Score each section. Each mark is worth one point.

Category	Score
Your club experience	
Service and social events	
Members	
Image	
Business and operations	

2. Look at the categories with the lowest scores. How can your club turn the suggested remedies into action? Enter your next steps below.

Action	Time frame	Person responsible

FEATURED RESOURCES

[Club Planning Assistant](#)

[Membership Assessment Tools](#)

[Membership resources](#)

[Brand Center](#)

[Learning Center](#)

