

THE ROTARY HEALTH CHECK

(Please mark in the appropriate column – the scores are shown in brackets next to the question)

1 MEMBERSHIP	SCORE
1.1 NETT GROWTH In Last Year > 10% (5); 5%-10% (4); 0%-4.9%(3); Nett Loss (0)	
1.2 RECRUITMENT – Number of Members Recruited in last year as a percentage of membership number at the commencement of the year. >20% (5); 11-20% (4); 5-10% (3); 1-5% (2); Nil Inductions(0)	
1.3 GENDER BALANCE in Club Predominance of one gender over other –the questions refer to the minority gender in your club. >40% (5); 25-39% (4); 10-24% (3); 1-10% (2); All one gender (0)	
1.4 AVERAGE AGE OF MEMBERSHIP Is the average age of your club members: >70 (1); 60-70 (2); 50-59 (3); 40-49 (4); <40years (5)	
1.5 PERCENTAGE OF MEMBERS LESS THAN 40 YEARS OF AGE More than 40% (5); 20 to 40% (4); 10to 19% (3); 1 to 9% (2); nil (0)	
1.6 ALUMNI: No of Alumni in your club as a % of total membership: (Include GSE, Scholars, RYLA, RYPEN, Youth Exchange, Rotaract, Other Rotary Programs) Expressed as a % of Total Membership >20% (5), 10-20% (4); 5-9% (3); 1-4% (2), 0% (0)	
1.7 RETENTION OF MEMBERS: Formula: No of members at end of year / Membership at beg of year PLUS total number of members inducted during year – As a %. The Example is 23 members at the beginning of the year, you inducted 7 new members – a total of 30 members you had during the year. You divide the actual number at year end (25) by the total of 30 and multiply by 100 to obtain the percentage outcome. Eg. $25/30 * 100 = 83.33\%$ Retention Rate: >95% (5); 90-94% (4); 85-89% (3); 75-84% (2); 60-74% (1); <60% (0)	
1.8 FRIENDS OR FAMILY OF ROTARY OPPORTUNITIES Our Club has a Friends of Rotary / Associates /Supporters program in place with key focus on long-term relationships: Yes (2); No (0)	
1: TOTAL MEMBERSHIP SCORE	

2 MARKETING & PUBLIC IMAGE		
2.1 NUMBERS OF PRESS ARTICLES IN LOCAL PAPERS IN PAST YEAR >20 (5); 15 to 20 (4); 8 to 14 (3); 3 to 7 (2); 1 or 2 (1); None (0)		
2.2 DIVERSITY OF MEDIA – Circle and then total how many in column Local Paper Mainstream Paper Television Radio- Major Stations Radio – Community Station Billboards Community Newsletter Other - Please Note and include in your number score		
2.3 CLUB BULLETIN / NEWSLETTER IS PRODUCED Weekly (3); Fortnightly (1); Irregularly (0)		
2.4 BULLETIN CONTENT is diverse, it is professional in layout / presentation and content Yes (3); Average (2); Poor (0)		
2.5 BULLETIN CIRCULATION BEYOND THE CLUB includes: Community Leaders, Library, Potential Members (5); Other Clubs & District Personnel & Potential Members (3); Other Clubs & District Personnel (2); Members Only (1)		
2.6 CLUB WEBSITE Do you have a Club Website – is it professional in appearance, easy to navigate and updated weekly? Professional, easy to navigate, updated weekly (5); Professional, easy, updated fortnightly (4); professional, easy to navigate, updated monthly (3); Not as professional looking as we would like (2); Updated each year (0)		
2.7 ARE YOU SEEN IN YOUR COMMUNITY? Are you visible in your community – ie have a Market, Run an Opportunity or Second Hand Shop, Have a stand at the Local Festival, Art Show, Sausage Sizzles, Working Bees, etc. Yes – have activities in our community at least twice a month – have signage always and wear our club T-Shirts and Hats (5); Yes – monthly, have signage and wear club clothing (4); Yes – we have our signage at all opportunities, but it is generally around once a quarter (3); We have the activities, but only have our T-Shirts – don't have signage which we take with us (2); We don't have club T-Shirts or signage – we do the job quietly and don't worry about the promotion of our work (1)		
2.8 CIRCULATION OF RI PUBLICATIONS Do you put RI Publications in Dentists', Doctors', etc Waiting Rooms? Yes – every month (3) Sometimes (2); Rarely (1); Never (0)		
2.9 ROTARY INTERNATIONAL WEBSITE Do you publicise the RI Website? Yes (3) No (0)		
2: TOTAL MARKETING & PUBLIC IMAGE SCORE		

3 BALANCE IN CLUB	
3.1 CLUB ACTIVITIES (Please mark in correct column) Avenues of Service Projects If 2 in each of the Avenues (5); 1 in each avenue (3), If less than 1 in each avenue (0)	
3.2 INVOLVEMENT OF MEMBERS In a 6 month period, What % of your club members are involved in a Club Activity? 100% (5); 90-99% (4); 80-89% (3); 50-79% (2); <50% (0)	
3: TOTAL BALANCE IN CLUB SCORE	
4 LEADERSHIP & DELEGATION	
4.1 PRESIDENT How many times has your club had a President who has served as President previously? Never (5); Once (2); > Once (0)	
4.2 SELECTION OF PRESIDENT ELECT Does your Club select and nominate a President Elect & Nominee without difficulty Yes – no problems (5); Usually have difficulty, but do have appointments on time (2); Don't have a PE in place (0)	
4.3 ALLOCATION OF COMMITTEE ROLES Based on Members specific area of interest &/or skill (5) By rotation after discussion with members (3) Random allocation (1)	
4.4 DISTRICT ACTIVITIES Our club is represented at District Seminars (PETS, District Assembly, Rotary Foundation Seminar) Always – 100% (5); 90% eligible attend (4); 50-90% attend (3); <50% attend (2); none attend (0)	
4.5 DISTRICT COMMITTEES No of members who serve on District Committees – expressed as a % of total membership of the club: > 15% (5); 10-14% (4); 5-9% (3); 1-4% (2); Nil (0)	
4: TOTAL LEADERSHIP & DELEGATION SCORE	

<p>5 CLUB SPEAKERS & WEEKLY MEETING PROGRAMME</p>	
<p>5.1 STYLE & FORMAT OF MEETINGS: Is it welcoming and inclusive in its style; have structured process for reports from members; well run by Sergeant; no one member is dominant? Yes, very well structured & welcoming (5); Clear structure, but welcome can improve (4); Very Welcoming to all visitors, but no reports from members (3); Meeting gets a bit out of hand – Sergeant doesn't control very well, but everything else ok(2); Has one or two who dominate meetings (1); No structure, members stick together and leave guests on their own, lots of in jokes, etc (0)</p>	
<p>5.2 LENGTH OF MEETINGS – TIME EFFICIENCY FOR MEMBERS – Do your meetings run for a reasonable length (ie 1 Hour or 2 ½ hours?) Generally suggest 2 ½ hours is too long (2); 1 ¼ hours to 2 Hours (3); 45 minutes to 1 ¼ hours (5)</p>	
<p>5.3 SPEAKERS PROGRAMME is organized: 2 Months Ahead (5); 4 Weeks Ahead (4); 2 Weeks Ahead (3); 1 Week Ahead (2); Not organized, usually shows 'To Be Advised' (0)</p>	
<p>5.4 BALANCE OF PROGRAM highlights a share of Community Speakers, Business Based, Rotary Speakers and Other Area of Interest. Is this program in place? Yes (3), No (0)</p>	
<p>5.5 HAS THE PROGRAM HAD CONSECUTIVE SPEAKERS ON THE SAME AREA: ie 2 Community Organisations or two less exciting topics two weeks running. If Yes – mark (0); if No – good balance (3)</p>	
<p>5.6 VOCATIONAL VISITS conducted in the past year Yes - have 2 or more (3); Have 1 per year (2); None in past year (0)</p>	
<p>5.7 ROTARY INFORMATION - In the past year, does the club have Rotary Information Segments (excluding Guest Speakers): At least once every two weeks (5); Held once a month (3); Ad hoc (0)</p>	
<p>5.8 MEETING EFFICIENCY – Do your Club Meetings start and finish on time? Always – Every Week without fail (5); Regularly - Say 11 out of 12 (4) ; Mostly – Say 8 out of 12 (3); About 50% of the time (2); Rarely (1); Never (0)</p>	

<p>5.9 CLIQUES IN SEATING – Do you regularly have cliques in the Seating Arrangements in the club? There are always a group who sit together (2); Sometimes (3); We have seating initiatives in place to move members around (4); No Cliques – members move around regularly (5)</p>	
5: TOTAL CLUB SPEAKERS & MEETING PROGRAMME	
6 FUND RAISING	
<p>6.1 ACHIEVING YOUR GOALS – In the last year, our Club set and achieved its Fund Raising Goals as follows: 100% (5); 90-99% (4); 80-89% (3); 70-79% (2); 50-69% (1); raised less than 50% of the goal set (0)</p>	
<p>6.2 DIVERSITY OF FUND RAISING ACTIVITIES: Do you have a diversity of fund raising activities in your club? Yes – funds raised from at least three main sources and several minor sources (5); Funds raised from 1 main and several minor sources (3); Funds raised from more a variety of varying sources (2) All from one project (1)</p>	
6: TOTAL FUND RAISING SCORE	
7 VENUE	
<p>7.1 VENUE: Is your venue easily identifiable – ie Both external and internal signage to assist visitors, guests, etc. Yes – Both external & internal (5); Partly (3); None at all (0)</p>	
<p>7.2 FOOD: If you have food as a part of your meals – honestly assess the standard of the food. Excellent (5); Very good – always reliable quality at a great price (4); Good meals at a reasonable price – generally similar style, but always nice (3); A bit patchy in quality –but quite edible (2); Poor meals, little variation and quality barely acceptable (0)</p>	
<p>7.3 HOSTS: Does your host genuinely welcome you at their venue – or do they see your Rotary Club as a bother or inconvenience. Yes – our hosts enjoy us being there (3); Generally welcome, but occasionally appear to be a bother around peak seasons (2); Our Hosts see us as a bother (0)</p>	
7: TOTAL VENUE SCORE	

8 SOCIAL ACTIVITIES	
8.1 NUMBER OF SOCIAL ACTIVITIES in the club in the last quarter? > 10 (5); 7 to 9 (4); 5 or 6 (3); 3 or 4 (2); < 3 (1)	
8.2 NEW SOCIAL ACTIVITIES – Suggested by New Members Have you asked your new members for ideas for social activities Yes (3) No (0) Have you acted on them and involved them in the organization: Taken up idea & involved new member (5); Taken up idea, not involved new member in it (3); Not taken up at all (0) Total up the two questions and write score in column	
8.3 INVOLVEMENT OF FAMILY & PARTNERS Does your club have partners and family attend: Always (5); Regularly (4); Occasionally (3); Rarely – once or twice a year only(1)	
8: TOTAL SOCIAL ACTIVITIES SCORE	
9 PLANNING	
9.1 DO YOU HAVE A STRATEGIC PLAN FOR YOUR ROTARY CLUB? Yes (5) No (0)	
9.2 OUR STRATEGIC PLAN IS UPDATED... Yes - At least annually (5); Not updated in last year – but did it the year before (3); Not updated for a few years (0)	
9.3 CLUB LEADERSHIP PLAN: Have you adopted the R I Club Leadership Plan? Yes – we have adopted the CLP fully (5) We are implementing it next year (3) We are not planning to adopt it at all (1) We haven't and don't plan to consider it in our club (0)	
9.4 CLUB PLANNING DAY is held in our Rotary Club Yes – Annually prior to the start of the Rotary Year (5); Not at all (0)	
9.5 CLUB ASSEMBLIES are held: 4 - 1 per quarter (5); 3 – 1 every 4 months (3); 2 – 1 every 6 months (2); 1 per year (1); None (0)	
9: TOTAL PLANNING SCORE	

10 BOARD MEETINGS	
10.1 FREQUENCY OF BOARD MEETINGS over the past year Once every month – total of 12 (5); 11 (4); 10 (3); 9 (2); 6 to 8 (1); < 6 (0)	
10.2 EFFICIENCY & AGENDA OF BOARD MEETINGS Do you set a clear agenda including timings and then meet them? Finish on time always (5); Within 10 minutes of estimate on agenda (4); Within 10 to 20 minutes (3); Within 20 to 30 minutes (2); > 30 Minutes longer (0)	
10.3 CLUB RECORDS Are Board Meeting Records filed and retained, readily available as required for reference: Yes (5); Yes – but resolutions not recorded separately (3); Poor filing & historical records (0)	
10: TOTAL BOARD MEETINGS SCORE	
11 FINANCES OF CLUB	
11.1 ACCOUNTABILITY – The Club has separate bank accounts for Administration & Fund Raising (or Projects) Funds. Yes – totally separate (5); No – but accounts for separately in ledgers and reporting (3); Combined totally (0)	
11.2 BUDGET - The club has set and approved a Budget prior to the commencement of the Rotary Year (ie in May / June latest) Yes (2); No (0)	
11.3 FINANCIAL REPORTS FOR THE BOARD MEETINGS include reporting of actual versus budget with variances – for both Administration and Fund Raising / Project Accounts Yes (2); No (0)	
11.4 FINANCIAL REPORTS TO CLUB MEMBERS are provided Six Monthly Yes (2); No (0)	

<p>11.6 USE OF I.T. AND ELECTRONIC COMMUNICATION are in place in our Club: Please circle those that are available and write total number circled as score in column :</p> <p>Direct Deposit for fees Direct Deposit for functions / sponsorships</p> <p>Credit Card Payments accepted Bulletin sent by Email</p> <p>Website Updated and source of updates for members SMS Communication</p> <p>Other (Please write down)</p>	
<p>11: TOTAL FINANCES OF CLUB SCORE</p>	
<p>12 SERVICE ACTIVITIES</p>	
<p>Mark in the column a score of (2) for each one of those listed which you feel you satisfy well in your club:</p> <p>12.1 Recurring programs – well serviced</p> <p>12.2 A range of projects are covered, rather than focused on just one or two areas.</p> <p>12.3 Do you seek input from your community partners on needs (ie Church, Councils, Government, Education facilities, Youth Workers, etc.)</p> <p>12.4 Are you as a club genuinely willing to serve those in the community who are in need – both individuals and organizations?</p> <p>12.5 Do you partner with other organizations in your service activities?</p> <p>12.6 Do you combine with other Rotary Clubs in service projects?</p> <p>12.7 Do you feel that you cover the avenues of service well – that is no one area of bias?</p>	
<p>12: TOTAL SERVICE ACTIVITIES SCORE</p>	
<p>TOTAL SCORE OVERALL</p>	

UNDERSTANDING YOUR SCORE

Topic	Comment
Membership	<p>30 or more – You are going very well</p> <p>23 to 29 – Review your plans and check you are following your plans</p> <p>0 to 22 – You need to review your current process and consider implementation of Two Up! or Club In A Club and look at assessing why members are not remaining in the club and your age profile.</p>
Marketing & Public Image	<p>31 or more – You are going very well</p> <p>24 to 30 – Review your plans and check you are following them.</p> <p>0 to 23 – Review your Bulletin style and content and then diversify the distribution; seek training on writing Press Releases; ask the District Marketing / Public Image Chair or Committee to speak at your club; ask for the topic to be included in District Assembly, etc.</p>
Balance In Club	<p>9 Or 10 – You are going very well</p> <p>6 to 8 – Review your overall service projects and timing to see if too clustered and aim to spread out if possible. Look at your club composition to see if your projects are when members are around.</p> <p>0 to 5 – Review and assess honestly your service profile to aim for a balanced service in each area – and identify when your members are best able to undertake projects. Avoid heavy clustering at key times of the year.</p>
Leadership & Delegation	<p>22 to 25 – You are going very well</p> <p>19 to 21 – Review your club leadership development and committee rotation structures to ensure effective training is occurring.</p> <p>0 to 18 – Strongly consider implementing the Club Leadership Plan if you haven't already; implement a process where your members are rotated regularly onto committees, commencing with their key area of interest & skill. Encourage actively in your club attendance at District activities and recommend those members who show an interest in District Committees to the Incoming District Governor for inclusion in the future.</p>
Club Speakers & Weekly Program	<p>36 to 39 You are going very well.</p> <p>28 to 35 Review your approach to your Weekly Meetings and double check each of the aspects. It is going along, but there may be some areas which need fine tuning.</p> <p>0 to 27 Review your approach – Agendas to ensure meetings are not too lengthy, ensure they both start & finish on time, speakers are organized around 2 months in advance & members are</p>

	<p>advised through Bulletin; Chairs, Greeters, Desk Duties are clearly set out and members know in advance of their responsibility. Encourage Visits off site from your meetings and set down parameters & guidelines for your Speaker Program to ensure diversity. Establish seating approaches to avoid cliques.</p>
Fund Raising	<p>8 to 10 You are going very well 6 to 7 Review your approach and check all is in place. 0 to 5 Recommend a review of your current core fund raising activities and do a brainstorm in your club to gain new ideas (Remember – all ideas are great ideas!). Consider grants training, so you can source grants for some of your projects.</p>
Venue	<p>12 to 13 You are going well 8 to 11 Review your venue suitability on at least an annual basis. 0 to 7 Invite your club for their input to the suitability of your venue, food, etc. Invite suggestions on alternatives – it is important to have a stable `home` for your club, but it must be able to meet your needs for service, ambience, reliability, etc.</p>
Social Activities	<p>16 to 18 You are going well 9 to 15 Review your range of activities and that they are relevant to not only the majority of your members, but your newer members. 0 to 8 Take stock of what you do – increase if not many activities and invite members to organize activities and include family members in them.</p>
Planning	<p>23 to 25 You are going well 13 to 22 Review your plans and identify those aspects that you currently don't do – and consider their implementation. 0 to 12 Recommend implementation of a Club Planning Day, the Club Leadership Plan – have a speaker on this to the club and the Board; have regular club assemblies and discuss key issues and seriously review establishing a Strategic Plan for your club over the longer term.</p>
Board Meetings	<p>13 to 15 You are going well 9 to 12 Review – ensure you have clear agendas, reports from Directors; timelines on topics and you have clear direction. 0 to 8 Establish a schedule for your Board Meetings, separate from club Meeting Times / Days if necessary, be clear on the requirements – reports from Directors and the role of the Board. Set a Clear Agenda with times for respective reports. Provide guidance to Secretary on record keeping of minutes, resolutions, etc. Ask Assistant Governor</p>

	/ District Governor for guidance.
Finances	<p>19 to 22 You are going well</p> <p>15 to 18 Review your accounts and reporting – ensure it is timely. Review the opportunities for electronic transactions, etc.</p> <p>0 to 14 Review the suitability of your bank account structure; reporting to the board, budgeting to be sure it is proactive and reported against. One of the key signs is that you will remit your payments to RI late, etc. – ensure you raise your invoices in a timely manner – which will result in payments being made earlier. Review the options for electronic banking and credit card facilities for your club.</p>
Service Activities	<p>13 o 14 You are going well</p> <p>9 to 12 Review to ensure you are making the most of the opportunities to link with your community partners.</p> <p>0 to 8 Review your service activities to assess the range and if they are really serving your community – or just simply continuing on `because we always do them'. Ask yourself who you can link with –other members of your community and other Rotary Clubs. Being proactive will be positive.</p>