

Vibrant Club Assessment Worksheet

Club leaders can use this worksheet as an assessment tool for assessing vibrancy of their club and identifying areas where the club needs support or development. The strategies listed below are common ways for clubs to adapt the best practices of effective Rotary clubs to suit their needs. The RI Strategic Plan, the *Planning Guide for Effective Rotary Clubs*, and the Recommended Rotary Club Bylaws are based on these best practices. Use this worksheet together with the “Be a Vibrant Club” guide. www.rotary.org/ridocuments/en_pdf/245en.pdf Discuss the results of this assessment with your board of directors and your AG and use it as a basis for development of an action plan to make your club even more vibrant and engaging for your current members, and to attract new members.

Rotary Club of _____ Assessment completed by _____
Name of club president: _____ Date _____
Rotary year of office: _____

Assessment scale:

5 Excellent 4 Very Good 3 Good * 2 Fair 1 Poor 0 Not implemented

* indicates that practice is in place and meets normal criteria. A 2 or below indicates a recommendation for action.

Best Practices Checklist

- The club has developed a strategic plan that addresses the club’s long-range goals, for the next three to five years, including those related to service projects, membership, The Rotary Foundation, public image, and leadership development. (Use a separate sheet to describe how the club will carry out its activities in each of these areas. Attach it to this worksheet.)
- The club has completed the *Planning Guide for Effective Rotary Clubs* to set annual goals for the upcoming Rotary year that support the club’s long-range goals.
- Club assemblies have been planned for the following dates to prepare for the upcoming year and keep club members informed:
 - Club assembly after district assembly:
 - Club assembly in preparation for governor’s official visit:
 - Club assembly to solicit innovative ideas from all members:
 - Other club assemblies:
- The club has developed a communication plan so that all members are informed.
- The club has developed a system to ensure continuity in leadership, including officers, committees, and long-term service projects. The system addresses
 - Succession planning
 - Documentation of procedures
 - Decision making

- The club has amended its bylaws to reflect its structure and practices.¹
 - All members have reviewed the bylaws.
 - All members have been given the opportunity to suggest changes.

- Fellowship activities have been planned for the year. (Use a separate sheet to describe them, and attach it to this worksheet.)
 - Weekly meetings include time for networking and socializing.
 - Club activities include family members.
 - Members provide input on social activities.

- The club has developed a system for keeping all members active 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 to help them get involved.

- The club has developed a comprehensive training plan.
 - President-elect attends PETS on _____.
 - All incoming club leaders attend district assembly on _____.
 - New member orientation is offered _____.

Club members are encouraged to attend

 - District Rotary Foundation seminar on _____
 - District membership seminar on _____
 - District leadership seminar on _____
 - District conference on _____

- The club has established committees that support its needs.

The club has the following committees:

 - Administration
 - Membership
 - Public relations
 - Service projects
 - Rotary Foundation
 - _____
 - _____
 - _____

- Club board of directors receives club committee reports every _____.

Additional District expectations:

¹ Check that your club is using the latest version of the [Recommended Rotary Club Bylaws](#). Outline any enhancements to the bylaws on a separate sheet and attach it to this worksheet.