

REPORT TO DISTRICT GOVERNOR OF CLUB ASSEMBLY VISIT



Assistant Governor _____ Assembly Date _____

Rotary Club of _____

1. **Complete this form after your initial club assembly visit and submit to the District Governor immediately. Keep a copy for your records and provide a copy to the Club President.**
2. **Use the form to evaluate the club's progress after subsequent visits. Distribute copies as above.**
3. **Answer "YES" or "NO" in the space provided. Use as much space as needed to add comments, make suggestions and to fully describe the issue where appropriate.**

Club Administration

- _____ Are all leadership (officers and committee chairs) positions filled?
- _____ Do club leaders generally understand the scope of responsibilities?
- _____ Are club goals established?
- _____ Are goals well rounded?
- _____ Do goals compliment District & RI goals?
- _____ Is club in good standing with District and RI dues paid and reports made?
- _____ Are monthly attendance reports being submitted before the 10th of each month?
- _____ Is the club current in filings as required by state and federal agencies (990, Corp. Comm., etc.)?
- _____ Are financial reports and board minutes shared with entire membership at meetings or emailed?

Comments/Suggestions/Descriptions:

Leadership

- _____ Is a club plan in place to identify, train and groom new leaders?
- _____ Is there any mentoring or training of new leadership by past leaders?
- _____ Are newer members given the opportunity to lead?
- _____ Is leadership constantly renewing or is the club recycling the old guard?
- _____ Is there a training opportunity in this area for the AG?
- _____ Did all club leaders (President, President Elect, Secretary and Treasurer) attend PETS/SETS?
- _____ Was there good representation at the District Assembly?
- _____ Does the club have specific plans to support District/RI events (training, conference, convention)?
- _____ Is there potential for any of the club leadership to be groomed for leadership at District level?

Comments/Suggestions/Descriptions:

Website

- _____ Does the club have a website? Address: _____
- _____ Do they have an e-bulletin?
- _____ Is the DG, DGE, DGN, AG and District newsletter editor included in bulletin distribution?
- _____ Is the club utilizing the District and RI websites and encouraging member use?
- _____ Is club membership being updated on the web using the Rotary portal?

Comments/Suggestions/Descriptions:

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Foundation

- _____ Are Foundation goals established?
- _____ Do they include "Every Rotarian, Every Year"?
- _____ Has a Foundation chair been appointed and a committee formed?
- _____ Is the club properly accounting for Foundation giving? Describe the method used.
- _____ Is the club forwarding Foundation giving deposits to RI at least semi-annually?
- _____ Does the club have their own foundation? If so, is it treated as a completely separate entity?

Comments/Suggestions/Descriptions:

Service Projects

- _____ Are club projects well rounded to include all the Avenues of Service?
- _____ Are service opportunities broad based to include members with various interests?
- _____ Are all committee chairs appointed and committees formed?
- _____ Are projects generally supported by entire membership?
- _____ Does the club have a signature project?
- _____ Does the club work with other clubs on any service projects?

Comments/Suggestions/Descriptions (Please include details of each club project.):

Fundraising

- _____ Is there total club participation and support of fundraisers?
- _____ Are funds generated properly accounted?
- _____ Are funds properly designated and reported back to the club members?

Comments/Suggestions/Descriptions (Include details of club's fundraisers with income estimates.):

Membership

- _____ Is a goal and growth plan in place?
- _____ Are the numbers being properly reported to the District and RI?
- _____ Is the club updating membership on the web through the Rotary portal?
- _____ Is the club balanced with numerous classifications represented?

Comments/Suggestions/Descriptions (Include description of club's growth and retention plan.):

Meetings

- _____ Are the meetings fun and informative?
- _____ Are the speakers generally interesting and of high quality?
- _____ Is the food appealing and the venue pleasing?
- _____ Is there anything special the club does to encourage member participation and interaction?

Comments/Suggestions/Descriptions:

Publicity

- _____ Does the club have a plan in place for ongoing or event publicity?

Comments/Suggestions/Descriptions?