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## Appendix 1: Inventory for the Rotary Club of \_\_\_\_\_

(Use the preceding Rotary year as a base)

The club inventory follows the guidelines set forth for effective clubs. The RI Board has determined that success in the following areas is essential to being an effective club.

**Effective clubs are able to  
Sustain and/or grow their membership base**

*Use the following to help evaluate the club's effectiveness in terms of membership.*

1. Number of members as of 30 June  
of the preceding Rotary year: \_\_\_\_\_
2. Peak club membership since charter: \_\_\_\_\_
3. Net membership growth in our club: \_\_\_\_\_
4. Club's monthly attendance average: \_\_\_\_\_
5. What orientation does your club give to new members?

6. Does your club have a Rotary information program in place for both new and continuing members?

☐ Yes ☐ No

Please describe:

**Effective clubs are able to  
Implement successful projects that address the needs of their communities and  
communities in other countries**

*Use the following to ascertain the club's effectiveness in terms of service projects.*

7. Number of Youth Exchange students:      Hosted \_\_\_\_\_  
Sponsored \_\_\_\_\_
8. Number of Interact clubs: \_\_\_\_\_
9. Number of Rotaract clubs: \_\_\_\_\_
10. Number of Rotary Community Corps: \_\_\_\_\_
11. Number of WCS projects: \_\_\_\_\_
12. Number of grants received from  
The Rotary Foundation for WCS projects: \_\_\_\_\_
13. Number of RYLA students sponsored: \_\_\_\_\_
14. Number of Rotary Friendship Exchanges: \_\_\_\_\_
15. Number of registered Rotary Volunteers: \_\_\_\_\_
16. List club participation in other Rotary programs:

**Effective clubs are able to  
Support The Rotary Foundation through both program participation and finan-  
cial contributions**

*Use the following to help evaluate the status of the club's participation in The Rotary  
Foundation.*

17. Check the following humanitarian programs in which your club participates:
- ☐ District Simplified Grants
- ☐ Individual Grants
- ☐ Matching Grants

18. Club participation in educational programs:

Number of Ambassadorial Scholars: Nominated \_\_\_\_\_

Selected \_\_\_\_\_

Hosted \_\_\_\_\_

Number of GSE team members: Nominated \_\_\_\_\_

Selected \_\_\_\_\_

Hosted \_\_\_\_\_

Number of Rotary Grants for  
University Teachers awarded: \_\_\_\_\_

19. Contributions:

General \_\_\_\_\_

Restricted \_\_\_\_\_

Cumulative total \_\_\_\_\_

Percentage of members contributing \_\_\_\_\_

Current year goal in US\$ \_\_\_\_\_

Will this be achieved? ☐ Yes ☐ No

**Effective clubs are able to  
Develop leaders capable of serving in Rotary beyond the club level**

*Use the following to ascertain the status of the club's leadership development.*

20. Did your predecessor attend PETS last year? ☐ Yes ☐ No

21. Number of club members who  
attended the district assembly: \_\_\_\_\_

22. Number of club members who attended  
the district Rotary Foundation seminar: \_\_\_\_\_

23. Number of club members who attended  
the district conference: \_\_\_\_\_

24. Number of club members who attended  
the RI Convention: \_\_\_\_\_

25. Number of club members who attended  
the district leadership seminar: \_\_\_\_\_

26. Number of members who have served, or expressed interest in serving as:

Assistant governor \_\_\_\_\_

Member of a district committee \_\_\_\_\_

### Club Operations

27. How frequently does the board meet? \_\_\_\_\_

28. How frequently are club assemblies held? \_\_\_\_\_

29. When was the most recent classification roster updated? \_\_\_\_\_

30. Does the club have a budget? ☐ Yes ☐ No

If yes, is it audited annually? ☐ Yes ☐ No

31. Does the board receive regular financial reports? ☐ Yes ☐ No

32. How frequently is your club bulletin published? ☐ Weekly ☐ Monthly

33. How often does your club observe the special months of the Rotary calendar, such as World Understanding Month, Foundation Month, and Magazine Month?

☐ Always ☐ Occasionally ☐ Never

34. Name the last club activity covered by the media and when it took place:

This event was covered by (check all that apply):

☐ Television ☐ Newspapers ☐ Radio

35. Does your club budget for promotion of its activities? ☐ Yes ☐ No

36. Do club members receive periodic training concerning the *Manual of Procedure* and the club's constitutional documents? ☐ Yes ☐ No