



PRESIDENT-ELECT TRAINING SEMINAR 2014

Club and District Support, The Americas

Julie Aubry

ROTARY STAFF AT YOUR SERVICE

Your Club and District Support Team: Zone 27



James 'Jim' Damato, Jr.



Julie Aubry

- **Introduction to Rotary Club Central**
- **Entering Goals**
- **District-level Features**
- **Questions**

ROTARY CLUB CENTRAL



Centralizes information



Eliminates paper forms



Fosters continuity in leadership



Enable clubs to track their progress



Creates transparency



Showcases the important work that Rotary clubs do worldwide

MY CLUB SNAPSHOT

CLUB NAME

San Ramon Valley

WEBSITE

<http://www.sanramonvalleyrotary.com>

MEETING LOCATION

Crow Canyon Country Club
711 Silver Lake Dr., San Ramon, CA, 94526, United States

MEETING DATE AND TIME

Wednesday 7:00 PM

MEMBERS

46

CHARTER DATE

8-Aug-1994

CLUB PRESIDENT

Tom V. Eager

CLUB GOALS SET: 100%



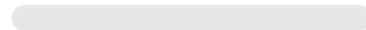
CLUB GOALS ACHIEVED: 36%



SERVICE GOALS SET: 67%



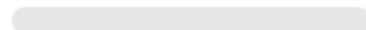
SERVICE GOALS ACHIEVED: 0%



FOUNDATION GIVING GOALS SET: 50%



FOUNDATION GIVING GOALS ACHIEVED: 0%



ROTARY CLUB CENTRAL

[VIEW GOALS](#)

[My Rotary](#)

[Exchange Ideas](#)

[Take Action](#)

[Learning & Reference](#)

[Manage](#)

[The Rotary Foundation](#)

[Member News](#)

[GIVE](#)



up space. This is just some sample content to take up space.

MAP

City or region



MY MESSAGES

Your inbox is currently empty.

[Go to messages >](#)

ANNOUNCEMENTS

[Download 2013 Convention speeches, reports, and resources](#)

1-JUN-2013

[RI Board recognizes new Rotarian Action Groups](#)

6-FEB-2013

[See more >](#)

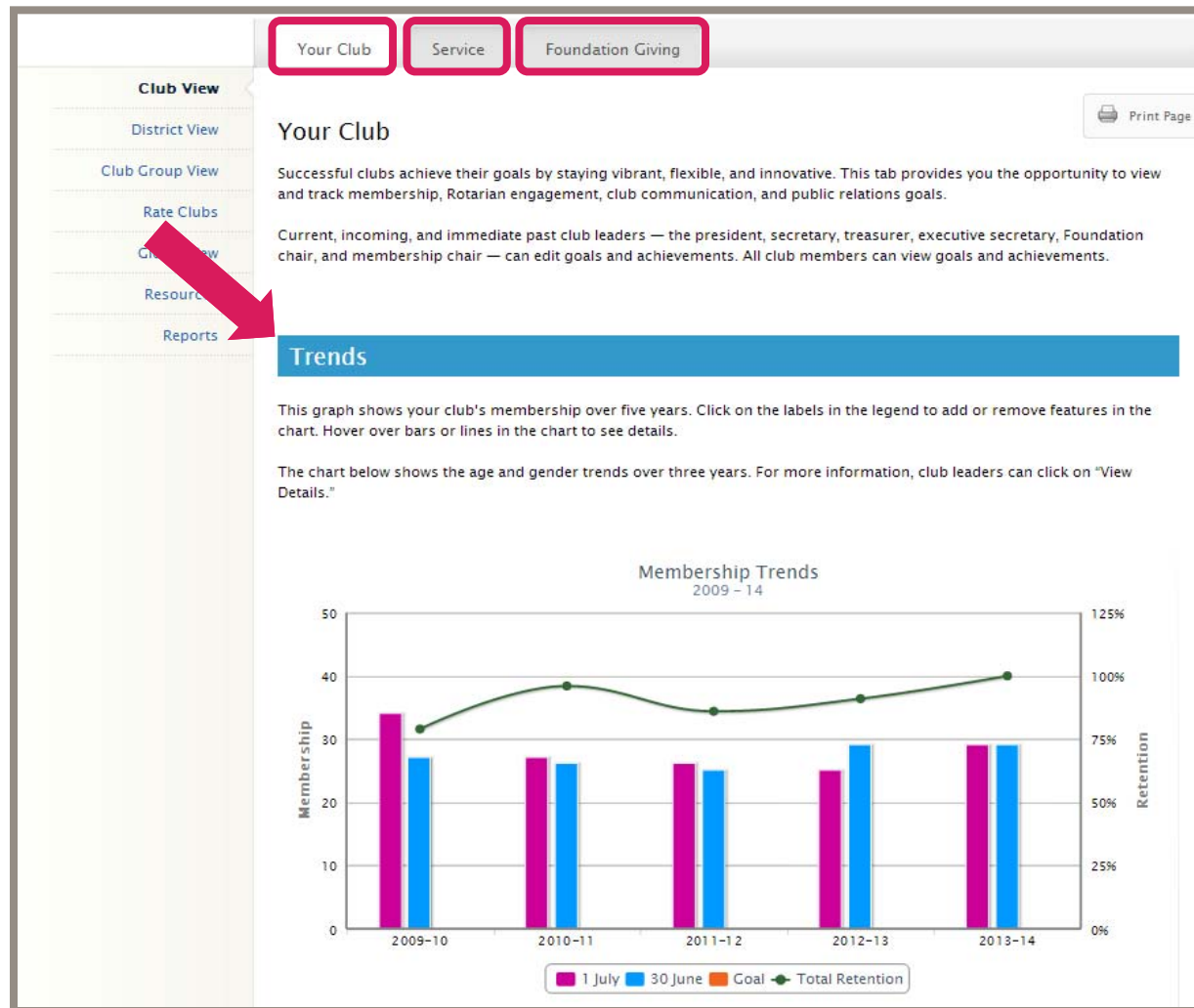
GROUP DISCUSSIONS

[MY GROUPS](#) [ALL GROUPS](#)

Sorry, no discussions have been started for this group yet.

[View My Groups >](#)

ROTARY CLUB CENTRAL




Membership Trends

- Start and End Dates (5 year trends)
- Gender (3 year trends)
- Age Trends (3 year trends)

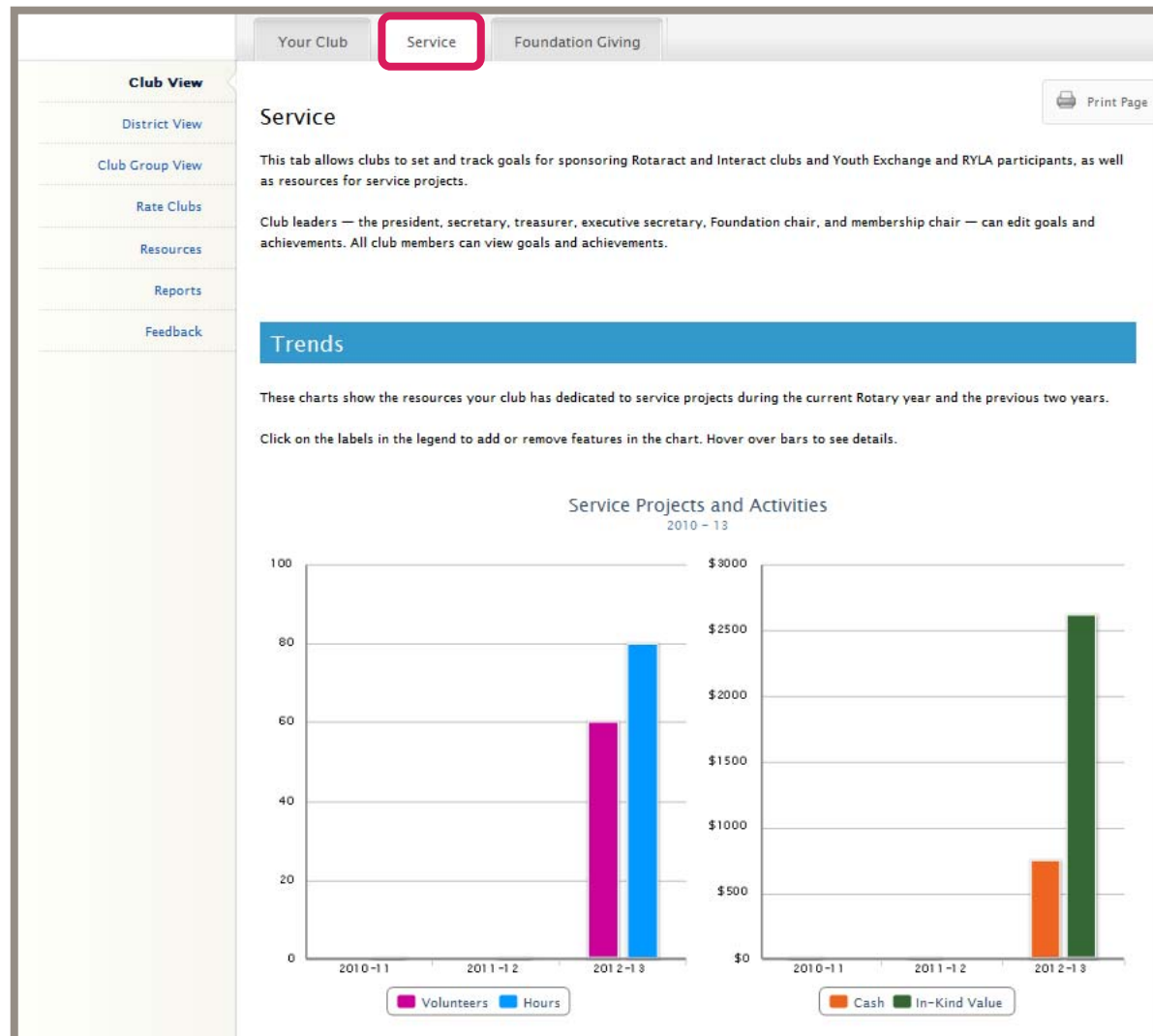
Age Trends ?				View Details
	2011-12 TOTAL	2012-13 TOTAL	2013-14 YEAR TO DATE	
29 and under	0% (0)	0% (0)	0% (0)	
30 - 39	40% (12)	39% (13)	43% (15)	
40 - 49	20% (6)	21% (7)	20% (7)	
50 - 59	30% (9)	30% (10)	29% (10)	
60 - 69	3% (1)	3% (1)	6% (2)	
70 and over	7% (2)	6% (2)	3% (1)	
Unreported	0% (0)	0% (0)	0% (0)	

Your Club

- **Membership Retention**
- **Rotarian Engagement**
- **Club Communications**
- **Public Relations**



Public Relations ?				 EDIT
	2012-13 TOTAL	2013-14 GOAL	2013-14 YEAR TO DATE	
Number of times we update our website per month	-	-	-	
Number of media stories (broadcast and/or print) covering our club's projects per year	-	-	-	
Number of advertisements we place per year	-	-	-	

ROTARY CLUB CENTRAL

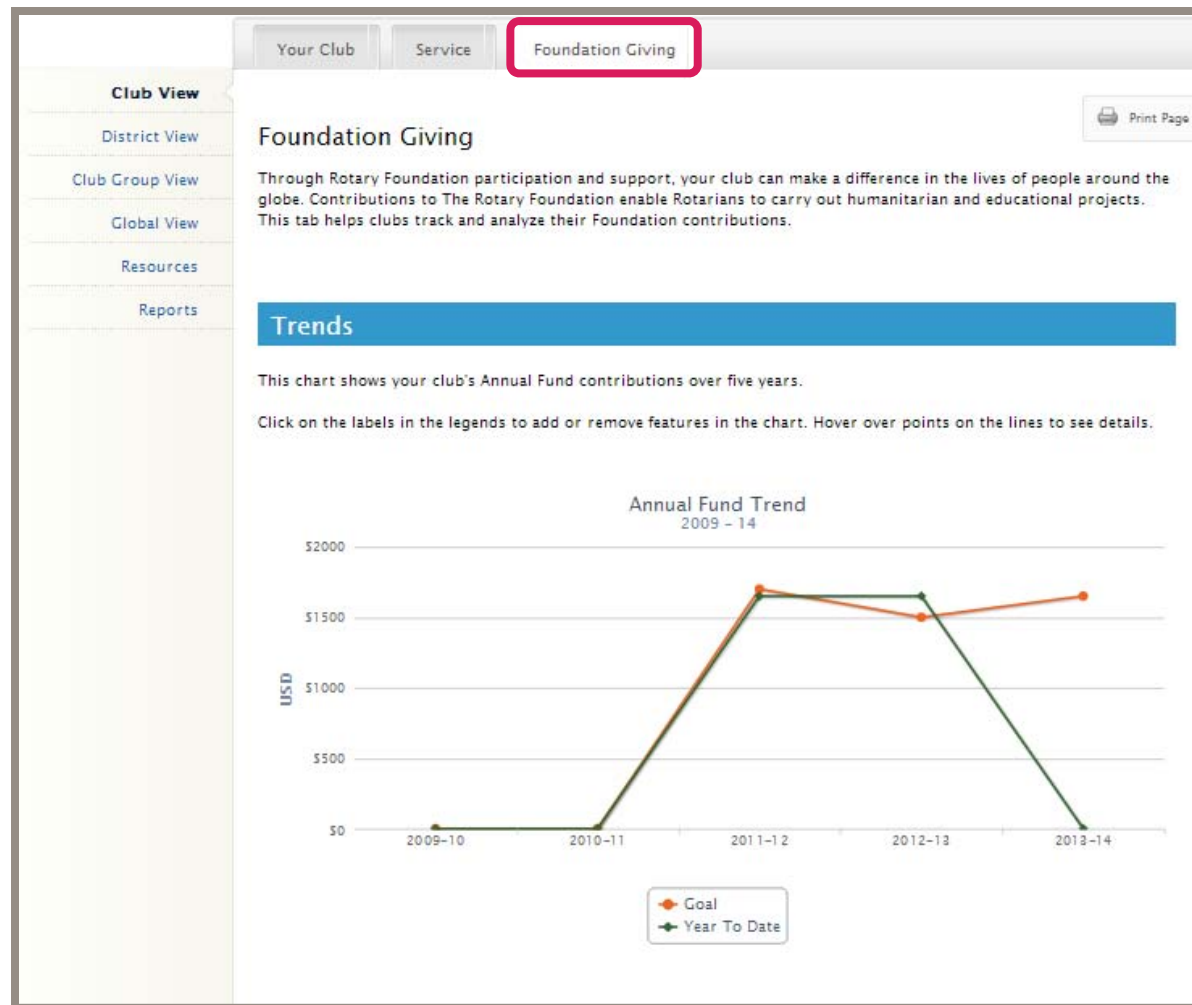


Service

- **Service Projects and Activities**
- **New Generations Clubs**
- **New Generations Participants**

New Generations Participants 				 EDIT
	2012-13 TOTAL	2013-14 GOAL	2013-14 YEAR TO DATE	
Number of inbound Youth Exchange students	0	-	0	
Number of outbound Youth Exchange students	0	-	0	
Number of RYLA participants	-	-	-	

ROTARY CLUB CENTRAL



Foundation

- Annual Fund
- Polio Plus
- Major Gifts and Endowment Fund

Annual Fund ?				EDIT
Major Gifts and Endowment Fund ?				EDIT
	2012-13 TOTAL	2013-14 GOAL	ALL-TIME TOTAL	
Major Gifts	0	-	0	
Bequest Society	0	-	0	
Benefactors	0	-	0	
Year				
Other Contributions	1650 USD	- USD	1650 USD	

ROTARY CLUB CENTRAL

Resources

Club View
District View
Club Group View
Global View
Resources
Reports



Your Club Service Foundation Giving

Print Page


Resources

- Assess Your Club
- Engage Your Members
- Run Your Club

Assess Your Club

-  [Assessing Club Membership](#)
-  [Finding and keeping members](#)

Engage Your Members

-  [Club Leadership Plan](#)

ROTARY CLUB CENTRAL

Reports

Club View
District View
Club Group View
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Your Club Service Foundation Giving

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Reports

- Worldwide Reports
- Club Reports

Worldwide Reports

- Club Member Count by Country and Geographic Area
- Club Member Count by Zone and District
- Gender Count by Country and Geographic Area
- Gender Count by Zone and District

Club Reports

- Club Growth
- Member Viability and Growth
- Membership Termination Profile
- Members in a Club
- Goal History by Club

ROTARY CLUB CENTRAL

Global View

Club View

District View

Club Group View

Global View

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Global View

This view provides you the opportunity to see the global impact of club service projects. You can also see how clubs are involved with New Generations, including Rotaract and Interact clubs, as well as Youth Exchange and RYLA participants on a global scale.

Goals and Progress

Select the year you want to view.

2012-13

2013-14

2014-15

Service Projects and Activities

10% CLUBS WITH GOALS	7333067 PROJECTS SET AS GOAL	0% PROJECTS ACHIEVED	3203 PROJECTS ACHIEVED
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- **Introduction to Rotary Club Central**
- **Entering Goals**
- **District-level Features**
- **Questions**

Goals and Progress


You can access yearly data by selecting the appropriate tab. After reviewing trends, set your goal or edit it at any time by selecting the "Edit" tool.

2012-13

2013-14

2014-15

Annual Fund

 EDIT

3027 USD

2010-11
TOTAL

4500 USD

2012-13
GOAL

0 USD

2012-13
YEAR TO DATE

	2010-11 TOTAL	2012-13 GOAL	5-YEAR HIGH
Paul Harris Society	0 USD	1000 USD	0 USD
Sustaining Members	791 USD	1000 USD	791 USD
Every Rotarian, Every Year	57 USD	1500 USD	61 USD
Other Contributions	2179 USD	1000 USD	2970 USD

PolioPlus Fund

 EDIT

	2011-12 TOTAL	2012-13 GOAL	YEAR TO DATE
PolioPlus Fund	1624 USD	1000 USD	No Data USD

Major Gifts and Permanent Fund

 EDIT

	2010-11 TOTAL	2012-13 GOAL	ALL-TIME TOTAL
Major Gifts	0	0	0
Bequest Society	0	1	0
Benefactors	0	2	0

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Annual Fund

Every Rotarian, Every Year encourages Rotarians to participate in Foundation programs and to make a financial contribution to the Annual Fund each year.

For each goal, enter the number of individual donors and the average contribution you anticipate receiving. The total amount for that goal will be calculated automatically. Your Paul Harris Society goal should only reflect the Annual Fund giving, not PolioPlus contributions. Each club member is counted in only one category.

Set and Edit Your Goals

	5-YEAR HIGH	NUMBER OF INDIVIDUAL DONORS	AVERAGE CONTRIBUTION AMOUNT	GOAL TOTAL
Paul Harris Society (1000 USD or more)	27248 USD	<input type="text" value="3"/>	<input type="text" value="2000"/> USD	6000 USD
Achievement				19319 USD
Sustaining Members (100 USD or more)	7649 USD	<input type="text" value="6"/>	<input type="text" value="500"/> USD	3000 USD
Achievement				0 USD
Every Rotarian, Every Year (Up to 100 USD)	875 USD	<input type="text" value="42"/>	<input type="text" value="50"/> USD	2100 USD
Achievement				0 USD
Other Contributions (Fundraising events, corporate and community gifts)	12800 USD			<input type="text" value="6000"/> USD
Achievement				5319 USD
2014–15 Goal Total				17100 USD

Club Communication

Effective communication strengthens a club's involvement in the community and ensures all members are informed about club activities. Set these goals and report your club achievements throughout the year.

Set and Edit Your Goals

Numeric
Monetary (USD)
Percentage %
Yes / No

	PREVIOUS YEAR	GOAL TOTAL
	-	YES ▾
		- ▾
	-	3
		4
urrent activities	-	YES ▾
		YES ▾
er month	-	4
outside of club meetings	-	0
		-

Save

Clear all

Cancel

Who can enter goals?

CLUB LEVEL

President
Secretary
Treasurer
Foundation Chair
Membership Chair
Executive Secretary
Officers elect

DISTRICT LEVEL

District Governor
*Assistant Governors
Committee Chairs
Executive Secretary

- **Introduction to Rotary Club Central**
- **Entering Goals**
- **District-level Features**
- **Questions**

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District Summary View

It's important for district leaders to understand the course the district's clubs are taking to reach their goals. This summary page includes goal and achievement figures to show the district's progress. District leaders can see individual club goals and progress by clicking "View."

Trends

[2012-13](#)[2013-14](#)[2014-15](#)

Annual Fund

 [VIEW](#)

98%

CLUBS WITH GOALS

215308 USD

2012-13 GOAL

88%

ACTUAL CLUB PARTICIPATION

154910 USD

2012-13 YEAR TO DATE

	CLUBS WITH GOALS	2012-13 GOAL	ACTUAL CLUB PARTICIPATION	2012-13 YEAR TO DATE
Paul Harris Society	0%	- USD	35%	31049 USD
Sustaining Members	6%	11600 USD	76%	75140 USD
Every Rotarian, Every Year	10%	6510 USD	65%	36858 USD
Other Contributions	86%	196748 USD	35%	11862 USD

Your Club

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Foundation Giving

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Track the Clubs in Your District

View the goals and progress for all clubs in the district. Use the drop-down menus to select the category and supporting goal. District leaders can edit club goals on behalf of a club by clicking "View."

2012-13

2013-14

2014-15

VIEW DATA FOR: Membership Retention

VIEW SUPPORTING GOAL: Choose One

Membership Retention

<u>CLUB NAME</u>	<u>CLUB GROUP</u>	<u>GOAL</u>	<u>GOAL PROGRESS</u>	
Atlantis	Area G	-	12	View
Atlantis Sunrise	Area J	-	61	View
Sesame Street	Area J	-	21	View
Gotham	Area C	-	16	View
Metropolis	Area Q/R	-	15	View
Metropolis Sunset	Area K	-	38	View
Tattooine	Area O	-	30	View
Twin Peaks	Area E	-	17	View
Greendale	Area N	-	29	View

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Club Group View

Club Group View shows assistant governors information about the goals and achievement for their assigned clubs. If there are no club groups in the drop-down menu, contact your district governor. District leaders can see individual club goals and progress by clicking "View."

Goals and Progress

Some text can go here

2012-13

2013-14

2014-15

CLUB GROUP:

Area A

Members

Area A

Area B

Area C

Area D

Area E

Area F

Area G

Area H

Area I

Area J

Area K

Area L

Area M

Area N

Area O

Area P

Area Q/R

0

CLUBS WITH

GOAL

100%

ACTUAL CLUB PARTICIPATION

55

2012-13 YEAR TO DATE

 VIEW

2012-13 GOAL

ACTUAL CLUB
PARTICIPATION

2012-13 YEAR TO DATE

Existing members
retained

-

100%

54

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Track the Clubs in Your District

View the goals and progress for all clubs in the district. Use the drop-down menus to select the category and supporting goal. District leaders can edit club goals on behalf of a club by clicking "View."

2012-13

2013-14

2014-15

VIEW DATA FOR: **Membership Retention**VIEW SUPPORTING GOAL: **Choose One**

Membership Retention

[CLUB NAME](#)[CLUB GROUP](#)[GOAL](#)[GOAL PROGRESS](#)

Metropolis

Area A

-

22

[View](#)

Twin Peaks

Area A

-

12

[View](#)

Greendale

Area A

-

21

[View](#)

ROTARY CLUB CENTRAL

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District: 0000 | Club

Portland

Portland

Portland Metropolitan

Portland New Generation

Portland Pearl

Portland-Westside

Salem

Salem Sunrise

Salem Sunset

Salem-Creekside

Seaside

Sheridan

Sherwood

Sherwood Old Town

Silverton

South Salem

Southeast Portland

Southwest Pacific County-Peninsula

Southwest Portland

Stayton Area

The Dalles

Tigard

Tigard Breakfast

Tillamook

Tualatin

Vancouver

Vancouver Metro Sunset

Vancouver Sunrise

Wallowa County

Warrenton Sunrise

West Columbia Gorge

Your Club

Service

Foundation Giving

Successful clubs achieve their goals by staying vibrant, flexible, and innovative. This tab p track membership, Rotarian engagement, club communication, and public relations goals.

Club leaders — the president, secretary, treasurer, executive secretary, Foundation chair, and achievements. All club members can view goals and achievements.

Trends

This chart shows your club's membership over five years.

Click on the labels in the legend to add or remove features in the chart. Hover over bars

Membership Trends

2008 - 13

500



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Rate Clubs

District governors and assistant governors rate clubs to inform Rotary International about the overall effectiveness of their clubs.

District governors can view ratings and comments for all clubs. Assistant governors can view ratings and comments for clubs in their club group.

★★★★★	Excellent	This club is strong and vibrant, and members are consistently engaged in club activities.
★★★★☆	Good	This club is informed and engaged but could increase its effectiveness.
★★★☆☆	Satisfactory	This club functions properly but could improve in several areas.
★★★☆☆	Needs improvement	This club needs significant assistance.
★☆☆☆☆	Nonfunctional	This club has failed to meet the policy established by the RI Board for a functioning Rotary club.

✓ District governors and assistant governors may also submit comments about each club. Ratings and comments are seen only by the district governor and assistant governor; **they are not visible to the clubs.**

✓ District governors will confirm and submit ratings once all the clubs in the district have been rated, **no later than 1 June.**

Clubs in Your District

2012-13

2013-14








2014-15

Clubs in Your District

2012-13

2013-14

2014-15

CLUB NAME	CLUB GROUP	GOVERNOR VISIT	2011-12 RATING	RATE	COMMENTS
Atlantis Details	Area G	<input checked="" type="checkbox"/>	☆☆☆☆☆	☆☆☆☆☆	
Atlantis Sunrise Details	Area J	<input checked="" type="checkbox"/>	☆☆☆☆☆	☆☆☆☆☆	
Sesame Street Details	Area J	<input type="checkbox"/>	☆☆☆☆☆	☆☆☆☆☆	
Gotham Details	Area C	<input checked="" type="checkbox"/>	☆☆☆☆☆	☆☆☆☆☆	
Metropolis Details	Area Q/R	<input checked="" type="checkbox"/>	☆☆☆☆☆	☆☆☆☆☆	
Twin Peaks Details	Area K	<input checked="" type="checkbox"/>	☆☆☆☆☆	☆☆☆☆☆	
Greendale Details	Area O	<input type="checkbox"/>	☆☆☆☆☆	☆☆☆☆☆	

Governor Confirm Rating

By confirming these ratings, you indicate to Rotary International that each club has been visited and/or rated for the current Rotary year. These ratings will be kept on file.

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Questions?