



ONE WORLD ONE ROTARY



## 2020 Mid-Term Training President Webinar

January 25, 2020

District 5240 Midterms  
Presidents Session  
January 25, 2020

Rotary District 5240 – Rotary Year 2019-20



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## Introductions

Scott Phillips: Webinar Director

Presenters & On-Call for Questions:

- Savi Bhim, Governor, Rotary District 5240
- Marilyn Lippiatt, Chief of Staff
- PDG Frank Ortiz, Foundation Chair
- Lee Ginsburg, Membership Chair
- Scott Farrenkopf, Awards Chair
- Marta Golding Brown, Director of Education & Training

Rotary District 5240 – Rotary Year 2019-20


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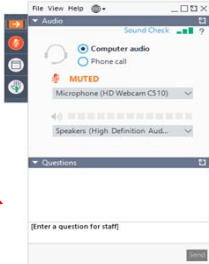



## WEBINAR PARTICIPATION

You are Muted

Type Questions Here

Handouts:  
Available on  
2019-2020 Page



Rotary District 5240 – Rotary Year 2019-20


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**Rotary**  Savi Bhim  
District Governor  
2019-2020  
District 5240

4 Rotary District 5240 – Rotary Year 2019-20 Rotary 

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**MEMBERSHIP MATTERS**

Marilyn Lippiatt, Chief of Staff

Lee Ginsburg, District Membership Chair  
leeg@michaelstravel.com

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**How Strong is Your Club?**

- Understand what works and what doesn't
- Do your members reflect the range of professions and cultures in our community?
- Are you achieving our club's goals?
- What qualities make your club attractive to new members?

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## Engage Members

Successful strategies to help deliver an experience that will keep members excited about Rotary:

- Survey your membership
- Regular recognition for achievements
- Keep members involved in club projects and activities
- Encourage members to take on leadership roles
- Send email, newsletters, photos, social media posts regularly

(retention)

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## Ask People to Join us We need their head, hands and heart

- Our next hands on projects...
- Help or participate in our next fundraiser...
- Join an activity and other great meeting topics
- Select a committee and join a meeting
- Attend the next social
- Get together at a mini social

***What is important to them?***

(recruitment)

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## Reflection Time

- Why did you join Rotary?
- What makes you stay
  - What do you love about your club or what you do?
  - What is/was your favorite project or event?
  - Why do you look forward to coming to the meetings?
- When did you become a ***Rotarian?***
- Finish the year **STRONG!**

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**ANY QUESTIONS?**



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**CLUB CENTRAL ACHIEVEMENT ENTRY**

Scott Farrenkopf  
EAG, Region 2  
bsfarrenkopf@gmail.com  
805-908-1095

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**Learning Objectives**

- Knowing how to access Club Central
- Entering Achievements in Goal Center
- Rotary Citation

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## Club Central Access

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## Club Central Access

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Club Central Access





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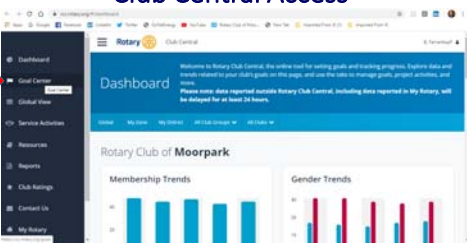
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Club Central Access





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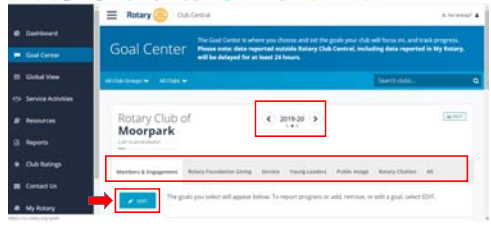
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Entering Achievements





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## Entering Achievements

Go thru all tabs or the "All" tab

Auto entered

Manually entered

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## Rotary Citation

Auto entered

Manually entered

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## ANY QUESTIONS?

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## AWARDS

Scott Farrenkopf  
EAG, Region 2  
bsfarrenkopf@gmail.com  
805-908-1095

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## Learning Objectives

- Knowing where the Awards Criteria packet is
- Understanding when to submit
- Understanding how to submit
- Understanding post submission awards process
  - Regional Awards Celebrations
  - District Awards Celebration & DG Stepdown

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## Awards Criteria Packet



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## Awards Criteria Packet

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## Awards Criteria Packet

A Word file will download to your Computer whose 1<sup>st</sup> page looks like this.

This document is broken into these parts:

- Overview
  - Introduction
  - Application Submission Timing & Ceremonies
  - Key Individual Awards Areas for Clubs
  - Overall Awards Areas for Clubs
  - Rotary Citation
  - General Award Info – Club Size
  - Awards Preparation Steps
  - Awards Areas for Rotarians
  - Awards Summary
- Club Service Submission Section
- Community Service Submission Section
- International Service Submission Section
- Vocational Service Submission Section
- Youth Service Submission Section
- Membership Submission Section
- Foundation Submission Section
- Branding Submission Section
- Silver Submission Section
- Gold Submission Section
- Platinum Submission Section

Club Committee Chairs fill-in blue text sections noted.  
Club Awards Chair fills in orange text sections noted, consolidates, and enters online.

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## When to Submit

- There is **ONE** submission date for Regional & District Awards
- Submit between April 1<sup>st</sup> and April 15<sup>th</sup> by 11:59 PM

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### How to Submit

- Community Service - *Service*
- International Service - *Service*
- Vocational Service - *Service*
- Youth Service - *Young Leaders*
- Club Service - *Members & Engagement*
- Membership - *Members & Engagement*
- Foundation - *Rotary Foundation Giving*
- Branding - *Public Image*
- Silver
- Gold
- Platinum

These are the sections that you can submit points and comments for.


EVERY club should submit even if they feel they cannot win an overall Best Club Award (bell box).

You might be the best Regional or District club in one of the Key Areas (1st 8 bullets to the left) so it is OK to only submit points and comments in one section!

NOTE: My Rotary Club Central Goal Achievement Entry Item also

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### How to Submit

- Have your Awards Criteria Packet Word document filled in by your Committee Chairs and Awards Chair and in front of the submitter (President with Awards Chair recommended)
- Go to this Survey Monkey website:  
<https://www.surveymonkey.com/r/RotaryD5240Awards>
- Enter your club information completely
- Enter your points and supporting comments for each question in a section then hit the "Next" button to advance to the next section (these are in the same order as the Word Awards Criteria Packet)
  - You can use the "Prev" button to return to a previous section
  - Comments will be used for breaking ties among clubs
  - Estimate points via the 4-Way Test for achievements to occur after April 15
  - Membership will be checked before District Awards
- Print out your submission
- Hit the "Done" button to submit (this can only be done ONCE)

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### How to Submit

**Club Service**

Recognition awards for Club achievements achieved from July 1, 2018 to April 15, 2020. Some criteria count for more than one category. The "Explain" box will expand as you briefly describe what you did.

**Acquire at least 80% (Large Club), 70% (medium Club), or 60% (small Club) of the possible section points from the following:**

3. Appoint or elect a Club Rotarian to each of the following Committee Chair positions - Club Service, Community Service, International Service, Vocational Service, Youth Service, Membership, Foundation, and Public Image and submit names and contact information to the District prior to July 1, 2019. (3 points each up to 3 points)

No Explain if completed

Survey Monkey looks like this.


Drag the slider to the points your club has achieved on each question.

Enter any comments.

At the end of each of the sections (not after each question) you will see buttons like this to advance to the next section or return to the previous

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### Awards Process

- There will be a bracket approach to awards – Regions first (May) and District second (June)
- Regional Club Area and Club Overall winners will advance to District
- Group Individual Rotarian Nominees will be announced at District
- Regional Awards Celebrations will occur between the middle and end of May – Most are listed on the District calendar already
- The District Awards Celebration and DG Stepdown will be low cost and occur on Saturday June 27<sup>th</sup> as a lunch

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### Awards Process - Regional

- 1) **Region Club Area Award Winners :**

a. Region x Club Service i. Small ii. Medium iii. Large  b. Region x Community Service i. Small ii. Medium iii. Large  c. Region x International Service i. Small ii. Medium iii. Large  d. Region x Vocational Service i. Small ii. Medium iii. Large  e. Region x Youth Service i. Small ii. Medium iii. Large	f. Region x Membership i. Small ii. Medium iii. Large  g. Region x Foundation i. Small ii. Medium iii. Large  h. Region x Branding i. Small ii. Medium iii. Large
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- 2) **District Club Metal Award Winners (Given at each Regional Awards):**
  - a. District Silver
  - b. District Gold
  - c. District Platinum
- 3) **Region Club Overall Award Winners :**
  - a. Best Region x Small Club
  - b. Best Region x Medium Club
  - c. Best Region x Large Club
  - d. Best Region x Overall Club

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### Awards Process - District

- 1) **Individual District Rotarian Awards Winners (From Group Nominees):**
  - a. District Rotarian of Action
  - b. District Samuel L. Green Service Above Self Award
  - c. District John Paulfus Humanitarian Service Award
  - d. District Robert "Boss" MacIntosh Leadership in Education Award
  - e. District Heather Funkle Dream Catcher Award
  - f. District Otto Austerlitz Health Service Award
- 2) **District Club Area Award Winners (From Regional Winners):**

a. District Club Service i. Small ii. Medium iii. Large  b. District Community Service i. Small ii. Medium iii. Large  c. District International Service i. Small ii. Medium iii. Large  d. District Vocational Service i. Small ii. Medium iii. Large  e. District Youth Service i. Small ii. Medium iii. Large	f. District Membership i. Small ii. Medium iii. Large  g. District Foundation i. Small ii. Medium iii. Large  h. District Branding i. Small ii. Medium iii. Large
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- 3) **District Club Overall Award Winners (From Regional Winners):**
  - a. Best District Small Club
  - b. Best District Medium Club
  - c. Best District Large Club
  - d. Best District Overall Club

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## QUESTIONS?



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## THE ROTARY FOUNDATION

Frank Ortiz  
District Rotary Foundation Chair 2019-2022  
PDG 2012-2013

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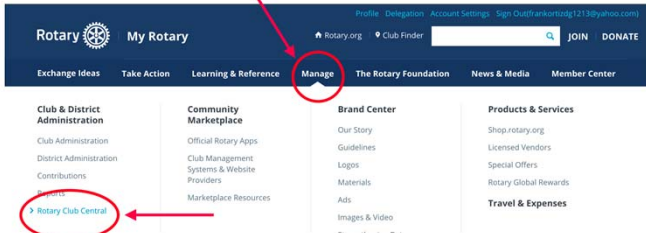
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<https://my.rotary.org>



Rotary My Rotary

Profile Delegation Account Settings Sign Out (frankortiz@1213@yahoo.com)

Rotary.org Club Finder JOIN DONATE

Exchange Ideas Take Action Learning & Reference **Manage** The Rotary Foundation News & Media Member Center

**Club & District Administration**

- Club Administration
- District Administration
- Contributions
- Reports
- Rotary Club Central**

**Community Marketplace**

- Official Rotary Apps
- Club Management
- Systems & Website Providers
- Marketplace Resources

**Brand Center**

- Our Story
- Guidelines
- Logos
- Materials
- Ads
- Images & Video

**Products & Services**

- Shop.rotary.org
- Licensed Vendors
- Special Offers
- Rotary Global Rewards

**Travel & Expenses**

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Rotary Club of [Name]

Reports

Report Name	Amount	Status
Club TRF Goals (auto-fill)	\$1,500	Auto-fill
Club TRF Goals (auto-fill)	\$1,500	Auto-fill
Club TRF Goals (auto-fill)	\$1,500	Auto-fill

Reflects the current status of your Club TRF Goals (auto-fill).

Club Reports

Report Name	Amount	Status
Club Reports	\$1,500	Auto-fill
Club Reports	\$1,500	Auto-fill
Club Reports	\$1,500	Auto-fill

Reports reflect the current contribution status of your Club.

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<https://www.rotarydistrict5240.org>

DISTRICT ROTARY FOUNDATION (DRFC)

Rotary Foundation

Related Pages

- District Rotary Foundation Committee (DRFC)
- Rotary Foundation

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The Rotary Foundation - Fundraising Sub-Committee

FUNDRAISING SUB-COMMITTEE

Subpages

- Fundraising Sub-Committee
- Recognition for Individuals and Clubs

Related Pages

- Paul Harris Fellow
- Paul Harris Society
- Major Donors
- Request Society
- Triple Crown Donor Circle

Links

- Files
- Every Rotarian Every Year
- Rotary Direct

Resources

DRFC - PDG Frank Ortiz (Santa Maria Breakfast): [frankortiz613@yahoo.com](mailto:frankortiz613@yahoo.com)

Annual Fund - PDG Luz-Maria Ortiz-Smith (Santa Barbara Sunrise): [luzmaria@emhansdortz.com](mailto:luzmaria@emhansdortz.com)

Paul Harris Society - PDG Sandi Schwartz (Bakersfield East): [sandschwartz1819@gmail.com](mailto:sandschwartz1819@gmail.com)

Endowments / Major Gifts - PDG Nick Frankle (Westlake Village Sunrise): [nickg1617@earthlink.net](mailto:nickg1617@earthlink.net)

FUNDRAISING Subcommittee

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**ONE WORLD ONE ROTARY**

The Rotary Foundation • Grants Sub-Committee • 2019-2020 District Grants

**Subpages**

**Related Pages**

**File**

Download Approved District Grants

**DISTRICT GRANTS 2019-2020**

District Grants provide funding to Rotary clubs and districts to support local and international humanitarian and service projects, community beautification, scholarships, and vocational training teams relating to the project/mission.

**Good News for District Grants:**

Effective immediately, district grants can now fund youth programs (including Rotary Youth Exchange, IFYA, Rotaract, or Interact), construction (including low-cost shelter), travel for staff of supporting organizations, scholar stipendium, emergency grant management positions, and activities previously implemented by an organization other than Rotary.

**The Grant Model also allows:**

- Scholarships with no restrictions on the level (secondary, university, or graduate), length, location (local or international), or area of study
- Service travel and disaster recovery efforts
- Vocational training teams for both domestic and international travel, entry and non-entry countries

**District Grant Policy:**

- For the period from January 15, 2019 – March 31, 2020
- Use of District Designated Funds (DDF) for District Grants is allocated for your club based on your past three years giving to The Rotary Foundation Normal Fund. The allocation schedule will be posted on the new grant and qualification web page.

**KEY POINT:**  
District Grants are Reimbursement Grants.  
No Final Report = No funding.

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**Paul Harris Society + Major Donor + Bequest Society = TRIPLE CROWN DONOR**

Rotary District D-5240

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**GRANT QUALIFICATION & DISTRICT GRANT APPLICATIONS**

- Reminder: Last webinar Feb 11 at 5:30 pm (register on District website)
- Send signed MOU & Club Resolution (for incorporated Clubs) to Grants Committee: [davgor@gmail.com](mailto:davgor@gmail.com)
- Submit MOU before 2020-2021 application

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**Frank Ortiz**  
**District Rotary Foundation**  
**frankortizdg1213@yahoo.com**

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**QUESTIONS?**



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**Rotary Branding & Public Image**

**Scott Phillips**  
**District Governor Designate**  
**scottdg2223@rotary5240.com**

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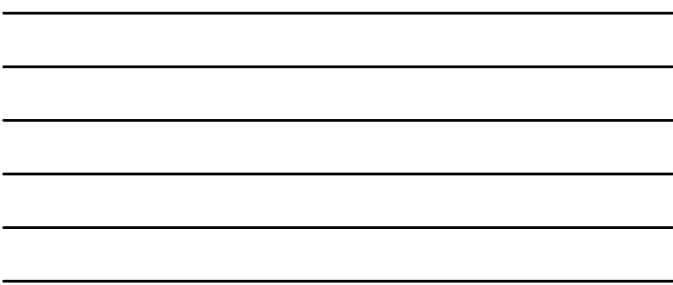
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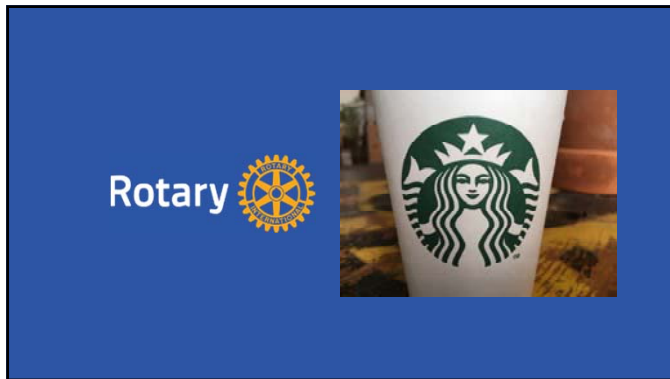
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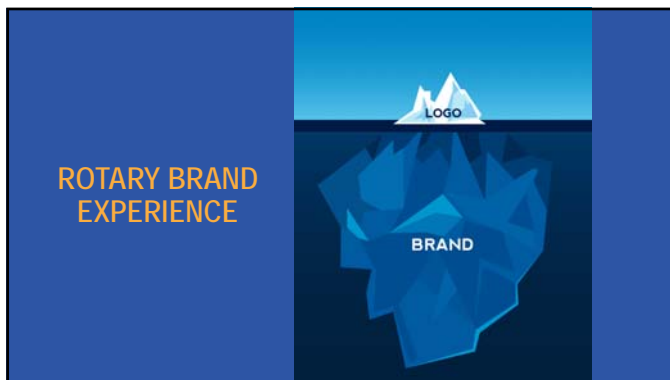
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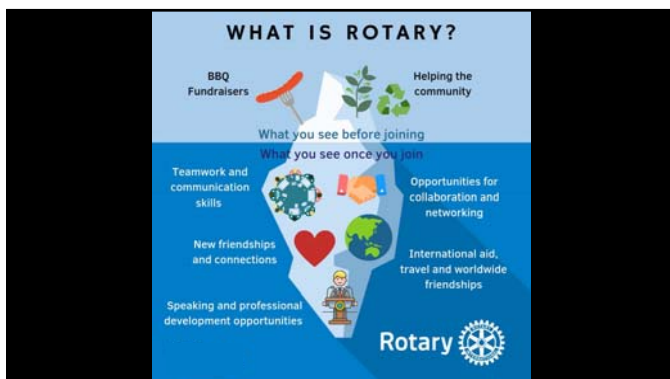
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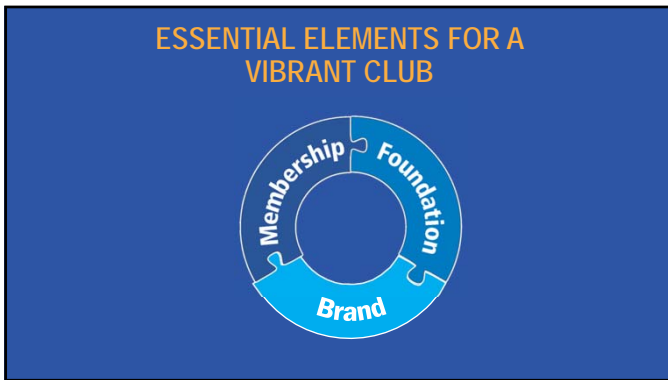
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PEOPLE OF ACTION PLANNING TOOL FOR ROTARY CLUBS			
Club name New Towne Rotary Club	Who are the champions and leaders? Co-Chairs: Mary Smith and Paul Harris	From whom do we need buy-in? Board, Club Members, Park Governing Body, Neighbors	Who needs regular updates? Board, Club Members, Park Governing Body, Neighbors
Describe: • Concept • Idea • Project • Event • Challenge	How will you include Rotary Brand focus: • Express clear Rotary club identification • Build pride for members • Inform the public & community about the project/event • Inform public & community about the club	How will you include Membership focus: • Attract prospective members • Engage current members • Build connections & friendships	How will you include Foundation focus: • Increase participation in projects • Share impact • Encourage giving • Provide recognition • Celebrate! • Attract future partners & donors
Rotarian at Work Day April 25, 2020  Local park that needs clean-up and rehab	1. Create signage using your club's Rotary logo 2. Wear Rotary apparel or a special People of Action shirt for the event 3. Provide updated club brochures at the event 4. Share widely on social media platforms in advance 5. Use Facebook Live to share the action and results of the project 6. Take lots of photos to use as People of Action posts and print ads 7. Involve the media	1. Get all members on board and excited! 2. Members invite family and friends to the event 3. Invite another club to participate 4. Involve Interact and Rotaract and Alumni 5. Promote the event well in advance and invite neighbors and city officials 6. Keep a sign in sheet for participants and invite them to the club to thank 7. Celebration at end to thank volunteers	1. Use a district grant 2. Include Polio information at sign in table and in brochure/purple pinkies at sign in or at celebration 3. Recognize financial sponsors with Paul Harris recognition at the club after event 4. Include the club's grant projects in social media 5. Can this be part of a larger project in the future using Foundation?

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## WHAT IS YOUR CLUB ROTARY BRAND EXPERIENCE?

**Rotary**

**EVALUATE YOUR ROTARY BRAND EXPERIENCE**

The Rotary Brand Experience is part of everything we do!  
The following questions are a starting point to help you better understand your club's Rotary Brand Experience and opportunities that may exist to strengthen your club.

**Our Impressions:**

- ☐ Our club has engaged with their Rotary club identity inside and outside the meeting.
- ☐ All guests are warmly welcomed and introduced to officers and members.
- ☐ Our club member guests with correct information and has exposure to follow-up.
- ☐ All visitors would feel comfortable attending our meeting in this location.
- ☐ Guests and speakers are welcomed as valued members.
- ☐ Our club has a brochure that explains the benefits of membership.
- ☐ Our website and social media are up-to-date, including clear Rotary identity and an easy way to contact our leadership.

**New Member Orientation:**

- ☐ Our club inducts new members in a personalized and meaningful way, including the "new" Rotary pin and member information.
- ☐ Our club has a written membership plan; we assign a mentor for each new member.
- ☐ New members' needs are assessed when engaging them in club activities and they are personally encouraged to thrive.
- ☐ We use an objective method to measure new member satisfaction.
- ☐ The club president meets personally with new members to assess satisfaction and engagement.

**Followings, Variety, and Communication:**

- ☐ Our meetings are relevant to both Rotarians and our guests, as well as published in advance.
- ☐ Our club has regularly scheduled social events which may include club-led events.
- ☐ Our website and social media pages are updated regularly to include photos of Rotarians as people of action.

**Program Planning and Meeting Organization:**

- ☐ Meetings are asked to complete a club evaluation at the end of each week.
- ☐ Our club provides ongoing Rotary education.
- ☐ We encourage members to sit at different tables each week.

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## ONE WORLD ONE ROTARY

ANY  
QUESTIONS?

Rotary District 5240 – Rotary Year 2019-20

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## ONE WORLD ONE ROTARY

### IMPORTANT DATES

**REMIND YOUR PE's**

**February 11, 2020**  
Final Club Grants Qualification Webinar for 2020-21 Grants

**February 12, 2020**  
Presidents Elect Nominees (PEN) Midterm Online

**March 14, 2020**  
District Training Assembly – Bakersfield

**March 21, 2020**  
District Training Assembly – Oxnard

District 5240 Midterms  
Presidents Election  
February 24, 2020

Rotary District 5240 – Rotary Year 2019-20

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**ONE WORLD ONE ROTARY**

**IMPORTANT DATES**




***PLEASE SAVE THE DATES...***

**June 27, 2020**  
District 5240 Awards and DG Stepdown

**June 30, 2020**  
2019-20 District Grant Final Reports Due

District 5240 Midterms  
Presidents Session  
January 23, 2020

**Rotary District 5240 – Rotary Year 2019-20**


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**ONE WORLD ONE ROTARY**





Rotary District 5240 – Rotary Year 2019-20



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**ONE WORLD ONE ROTARY**





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