2020 District Training Assembly Presidents Session

March 21, 2020

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

Savi Bhim
District Governor
2019-2020
District 5240
Corona Virus – Q & A

Richard Grossman
Rotary District 5240
Chief Operating Officer
MEMBERSHIP

B. Scott Farrenkopf
2019-20 District 5240 Awards Chair
2019-20 District 5240 Executive Assistant Governor – Region 2
bsfarrenkopf@gmail.com
805-908-1095
Session Take-Aways

• 1) District goal and actual for net membership growth
• 2) Why membership must be a club year-end focus
• 3) Club membership recruitment action
• 4) Club membership retention actions
• 5) Membership in the forefront District actions
District Goal & Actual Net Membership Growth

Current District 5240 Membership Status (14Mar20)

<table>
<thead>
<tr>
<th>District Membership Goal **</th>
<th>01 July Membership</th>
<th>Current Membership</th>
<th>Membership Net Growth (%)</th>
<th>Distance to Membership Goal</th>
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</thead>
<tbody>
<tr>
<td>3,499</td>
<td>3,145</td>
<td>3,121</td>
<td>-0.76%</td>
<td>378</td>
</tr>
</tbody>
</table>
District Goal & Actual Net Membership Growth

*Rotary’s 2019-20 Membership Experience Feedback Survey Results:*

**Why do members stay in Rotary?**
In the U.S., Canada, and the Caribbean:
- to positively impact their community (18%)
- to connect with other people in my new community (10%)
- for friendship and fellowship (9%)

**Why do members leave Rotary?**
In the U.S., Canada, and the Caribbean:
- Cost and time constraints (40%)
- Club environment and organizational culture (29%)
- Unmet expectations (16%)
Why Membership Must Be a Year-End Focus

Rotarians must realize that there is no “Service above Self” without the Rotarian!
There is no action without the “Rotarian of Action!”

• Presidents get too busy with all the things they need to do to keep the club running and often simply get diverted from a focus on membership
• Net membership growth will only happen with the President’s delegation of its oversight to the Club Membership Chair (CMC) and by regularly checking in
• Net membership growth will only happen if EVERY Club Rotarian takes it on as their responsibility and not just the CMC’s ... The Club must be the Membership Committee!

How can our beneficiaries get service if there is no one to serve?
Club Membership Recruitment Action

There just needs to be ONE simple priority action for every Club Rotarian:

*Invite just one high potential new Rotarian prospect to a Club meeting before year’s end*

With 3100 current Rotarians, this brings in 3100 potential new Rotarians!
If only 15% of these potential new Rotarians join, we gain 465 new members which exceeds the 378 we need to meet our goal!

Let’s keep this a focus and make it happen!
Club Membership Retention Actions

There just needs to be a few priority actions for Club leadership:

Communicate with members regularly, especially about dues and time commitments then make positive changes where there is concern!

Make your Club meetings fun ... create moments of laughter!

Have great interesting speakers ... educate & avoid non-profits + controversy!

Follow-up with MIA Rotarians to let them know they are missed!

Do a few hands on projects that touch members’ hearts – give them opportunities for their “Rotary Moment”
Membership in the Forefront District Actions

The District (Lee Ginsburg & Walt Stephens) will call the 2018-19 Club Membership Chairs (CMCs) of the top 5 clubs with the best 5 year membership growth and ask them to serve on a District Membership SWAT team.

If they can’t then the District will try the 2017-18 Club Membership Chair from the same high performing membership growth clubs.

Please encourage past CMCs to support this if your Club is on the top 5 5 year Membership growth list on the next slide.

After the team is formed we would like this SWAT team to divide up the District so each of them personally reach out by phone to check in with every club’s 2019-20 Current Club Membership Chair (CCMC) weekly (preferred) or no less than every 2 weeks.
## Membership in the Forefront District Actions

The following District 5240 Clubs were the top 5 net membership 5 year growth standard Clubs (eClub and Passport Club excluded):

<table>
<thead>
<tr>
<th>Rank</th>
<th>Club Name</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1)</td>
<td>Carpinteria Morning</td>
<td>+21</td>
</tr>
<tr>
<td>2)</td>
<td>Camarillo</td>
<td>+10</td>
</tr>
<tr>
<td>3)</td>
<td>Westlake Village Sunrise</td>
<td>+9</td>
</tr>
<tr>
<td>4)</td>
<td>Santa Maria-Breakfast</td>
<td>+8</td>
</tr>
<tr>
<td>5)</td>
<td>Goleta</td>
<td>+8</td>
</tr>
</tbody>
</table>
Membership in the Forefront District Actions

The Membership SWAT Team will do these things:

1) Request if the CCMC made a 1-2 minute inspirational membership recruitment and retention push during their weekly club meeting (assignment is to do so every week)

2) Ask what percentage of their Club Rotarians invited just one high potential new Rotarian prospect to a Club meeting (assignment is for every Rotarian to invite just one before this Rotary year’s end)

3) Ask how many new members were inducted (goal is 10%+ of the Club’s total membership ie. 10% of those invited to attend a meeting from 2) above)

4) Ask how many current members left and if so why (goal is 0% and if one is lost due to death or job move then replace and if one is going to be lost due to time or $ then refer to the eClub or a Passport Club)

5) Supply at least one actionable new recruitment method each week {ie. the Wanted poster idea, etc.} (assignment is 12 ideas – 1 for each week thru the Rotary year’s end)

6) Supply at least one actionable new retention method each week {ie. call a member who has been absent two consecutive meetings to find out if they are OK and let them know they were missed} (assignment is 12 ideas – 1 for each week thru the Rotary year’s end)
Membership in the Forefront District Actions

The SWAT Team members will be taking notes of how each club is doing and what their challenges are so if we need to deploy additional District resources to help we can.

I would like you to give all your current Club Membership Chairs details of this plan ASAP and have them expect weekly calls from a Membership SWAT Team member.
ANY QUESTIONS?
AWARDS

B. Scott Farrenkopf
2019-20 District 5240 Awards Chair
2019-20 District 5240 Executive Assistant Governor – Region 2
bsfarrenkopf@gmail.com
805-908-1095
Session Take-Aways

• 0) BREAKING NEWS
• 1) How to download Awards criteria
• 2) Preparing for Awards online submission
• 3) Experimenting with Awards online submission
• 4) Officially forwarding Awards submission
• 5) Regional Awards Celebrations
• 6) District Awards Celebration and DG Stepdown
Breaking News

1) The common Regional and District online awards submission date will be moved from 11:59PM on April 15, 2020 to 11:59PM on May 15, 2020 (a 1 month delay)

2) All four in-person Regional Awards Celebrations will be cancelled

3) Regional award winners will be announced on June 1, 2020 by website, social media, and/or District newsletter means

4) The District Awards Celebration and DG Stepdown on June 27, 2020 has not been cancelled and District winners will be recognized and previously announced Regional winners will receive certificates/patches in their Club packets along with any District recognitions.
How to Download Awards Criteria
How to Download Awards Criteria
How to Download Awards Criteria
How to Download Awards Criteria

• Click on the “District 5240 Awards Criteria” link
• The editable Word document will download to your computer
• Click on the downloaded Word icon and open the Word file
• Save the Word file to a folder first to use later
• Do not try to edit this Word file to save prepared awards points and comments until you save it first!
Preparing for Awards Online Submission

• Assign a Club Awards Chair to lead the submission activity and to work with the Club President and all the Club Board Directors/Committee Chairs:
  - Club Service Chair
  - Community Service Chair
  - International Service Chair
  - Vocational Service Chair
  - Youth Service Chair
  - Membership Chair
  - Foundation Chair
  - Branding Chair
Preparing for Awards Online Submission

The Awards Chair should open the saved Word file to the left called: 2019-20-District-5240-Rotary-Club-Awards-Criteria_9Nov19.docx

This actual document is NOT what is submitted to the District. It is simply filled in to prepare the Club to enter the information typed into it into a Survey Monkey website.
Preparing for Awards Online Submission

To understand the Awards process, the Awards Chair and President should read pages 2 – 7 of the “Awards Criteria”
The Awards Chair should fill-in the Club information on the left necessary to identify the Club when submitting.

It should be noted that the club size is based upon the Club’s membership as of July 1, 2019 (\textit{the District has already pulled this information and is shown on the next slide}) and NOT based upon the current membership.
### Preparing for Awards Online Submission

#### District 5240 Training Assembly 2020

<table>
<thead>
<tr>
<th>District</th>
<th>Club</th>
<th>Club Name</th>
<th>Total Members @ 1 July 2019</th>
<th>Club Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>5240</td>
<td>82338</td>
<td>Bakersfield Twilight</td>
<td>30</td>
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</tr>
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<td>5240</td>
<td>73587</td>
<td>Buellton</td>
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<td>22172</td>
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<td>661</td>
<td>Carpinteria</td>
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<table>
<thead>
<tr>
<th>District</th>
<th>Club</th>
<th>Club Name</th>
<th>Total Members @ 1 July 2019</th>
<th>Club Size</th>
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<tr>
<td>5240</td>
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<td>22723</td>
<td>Westlake Village Sunrise</td>
<td>53</td>
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</tbody>
</table>
Preparing for Awards Online Submission

The Awards Chair should segment the Awards Criteria and ask each of the 8 Club Board/Committee Chairs to fill in the Section (like the Community Service section to the left) related to their area of responsibility:

- Club Service – pages 9-10
- Community Service – page 11
- International Service – pages 12-13
- Vocational Service – page 14
- Youth Service – pages 15-16
- Membership – pages 17-18
- Foundation – pages 19-20
- Branding – pages 21-22

These are the 8 Area Awards

Clubs need NOT fill in all Sections if they do not want to compete for the Metal or Best Sized/Overall Club awards – they can still compete for the Best Sized Area awards in which they fill-in.
Preparing for Awards Online Submission

The Awards Chair should fill in the Metal Sections (like the Silver section to the left) and get Club Board/Committee Chairs input as required:
- Silver – page 23
- Gold – page 24
- Platinum – page 25
Preparation for Awards Online Submission

<table>
<thead>
<tr>
<th>Item</th>
<th>Points</th>
<th>Comments</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>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. (1 point each up to 8 points)</td>
<td>(1 point each up to 8 points)</td>
</tr>
<tr>
<td>8</td>
<td>Explain if completed: We also appointed 3 Fundraising Event Chairs.</td>
<td></td>
</tr>
</tbody>
</table>

Each Section has multiple numbered Items which are criteria like the #1 above.

Each Item has two rows – row 1 is the criteria & row 2 is for the achieved points and comments to be entered which will be submitted.

Each Item’s maximum available points are shown on row 1 in parenthesis in red text such as above: “(1 point each up to 8 points)”.

Enter your Club’s points for the Item on row 2 below the Item number where there is a red “0” by overwriting it with a numeric value from 0 up to the maximum points allowed.

Enter your Club’s comments for the Item on row 2 – Make sure to do this since the comments will be used to break ties between Clubs who have equal points in a Section!
Preparing for Awards Online Submission

<table>
<thead>
<tr>
<th>2</th>
<th>Have a new or continuing Community Service project in one of Rotary’s six “Areas of Focus” involving significant hands-on participation by Rotarians and family members, Rotaract members, and/or Interact members. (5 points up to 6 points if Rotaract and/or Interact are included per project up to a maximum of 5 projects for a maximum possible of 30 points) [Rotary Citation criteria 14A]</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Explain if completed:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4</th>
<th>Participate in a “Rotarians at Work Day” with Rotarians and family members, Rotaract members, and/or Interact members. (2 points up to 3 points if Rotaract and/or Interact are included) [Rotary Citation w Distinction criteria 2]</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Explain if completed:</td>
</tr>
</tbody>
</table>

Many Sections have Item numbers which are highlighted with green shading and whose criteria has dark green text or light green text in brackets following it.

These Items, if met, satisfy Rotary Citation criteria (dark green bracketed text) or Rotary Citation with Distinction (light green bracketed text). *(You will need to enter these achievements into My Rotary Club Central also as shown on the next slide in order to apply for your Rotary Citation)*

A separate document can be downloaded from the District website in the same area as the Awards Criteria describing the Rotary Citation.
Preparing for Awards Online Submission

Which goals will your club track this year? Browse goals by category and select only those you plan to pursue. Then save.

While this citation section is comprehensive, please utilize the achievement guide to ensure accurate reporting of your achievements.

Cliff Membership Committee

Appoint an active club membership committee comprised of no less than five members and report the chair to Rotary International.
Preparing for Awards Online Submission

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Points Possible: 66</td>
<td>Percentage Achieved:</td>
<td></td>
<td></td>
</tr>
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</table>

Each Section has a total points possible (addition of maximum points possible for all Items/criteria in that Section).

This Section example has 66 points possible.

The minimum points need met, based upon the Club size, to allow this Section to be counted towards achievement of a Metal (Silver/Gold/Platinum) Award.

This Section example requires a large Club to achieve 53 points, a medium Club to achieve 47 points, or a small Club to achieve 40 points to meet the minimum points required to apply the Section as meeting 1 of the minimum per-size-club Section point goals towards winning a Silver (6 Sections meet minimum), Gold (7 Sections meet minimum), or Platinum (8 Sections meet minimum) Metal Award.
Preparing for Awards Online Submission

• We realize that many Club activities which could have been used to achieve awards points from March onward may not be able to occur now whether it be fundraisers, projects, membership drives, etc.

• We hope the delay in submission until mid-March might offer Clubs the ability to return to normality and to possibly accomplish Service Above Self activities conducted by Rotarians of Action!

• Use the 4-Way Test to take credit for those activities which were scheduled but cancelled and note that fact in the comments ... This is also true of those activities which will occur after May 15, 2020 thru June 30, 2020.
Preparing for Awards Online Submission

• We encourage all Clubs, many of which are not meeting in person, to take this opportunity and time of isolation to have their Club Service, Community Service, International Service, Vocational Service, Youth Service, Membership, Foundation, and Branding/PR Chairs along with their leading Awards Chairs to start filling in their sections of the 2019-20 Awards Criteria to support the easy online submission for awards by May 15, 2020.

• This idle time would be a great time to start gathering and documenting all your accomplishments to date in preparation for your awards submission so all you have to capture are those additional accomplishments made after March.

• It is also important to note that there are many awards criteria which can be satisfied from your homes whether they are grant submissions, PR releases with news media, insuring all Rotarians’ social media accounts list Rotary as an organization they are a member of, District website story submissions, etc. Take this time to accomplish those types of activities.

• Finally, to win the Rotary Citation or Citation with Distinction recognition from RI, Clubs must enter data into My Rotary Club Central so now is also a great time to also start to enter your selected areas and accomplishments to date.
Experimenting with Awards Online Submission

2019-20 Rotary District 5240 Awards Submission

Survey Monkey TEST Website (for TESTING and EXPERIMENTING with your club’s award submission)

https://www.surveymonkey.com/r/TGHP6TM
Experimenting with Awards Online Submission

READ BEFORE CONTINUING

You might want to download the 2019-20 Awards and fill that out before entering your responses here. Once you enter your responses, you will NOT be able to go back and edit them.


If you are ready to begin entering your Club's Award Information, click the NEXT button below.

This type of button plus a “Prev” is at the bottom of every Section

Next
### Experimenting with Awards Online Submission

#### 2019-20 District Awards - TEST

**Club Information**

1. **Club Name**
   
2. **Club Size (as of July 1, 2019)**
   - Small (1-35 Members)
   - Medium (36-70 Members)
   - Large (71+ Members)

3. **Club President Name**
Experimenting with Awards Online Submission

Club Service

Recognition awards for Club actions/goals achieved from July 1, 2019 to Apr 15, 2020. Some criteria count in 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:

9. 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. (1 point each up to 8 points)

10. Explain if completed

District 5240 Training Assembly 2020
Experimenting with Awards Online Submission

SILVER CLUB

MANDATORY:
1. Meet the minimum per-size-club point goals for 6 of the 8 Awards Criteria for the District by April 15, 2020
(Club, Vocational, Community, International, Youth, Membership, Foundation, & Public Image)

PLUS: MUST COMPLETE AT LEAST FOUR (4) of the following:

277. Attain a membership Net increase of +3 for small clubs, +4 for medium clubs, or +5 for large clubs [members as of July 1, 2019 thru April 15, 2020]. (1 point) [Rotary Citation w Distinction criteria 1 – Large Club]

278. Explain if completed

District 5240 Training Assembly 2020
Experimenting with Awards Online Submission

Your Awards Submission

-- STOP --

Please print a copy of this page or Save as PDF for your records. Once you click DONE at the bottom, the results will be recorded and you will not be able to see them.

Club: Moorpark

Club President Name: Brad Lawson
Club President Email Address: bradlawson1@yahoo.com
Club President Phone Number: 805-358-1208

Awards Chair Name: Janice Parvin
Awards Chair Email Address: moorparkparvin@gmail.com
Awards Chair Phone Number: 805-390-5377

Club Service Responses:
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. (1 point each up to 8 points)
Points:
Explanation:
Officially Forwarding Awards Submission

2019-20 Rotary District 5240
Awards Submission

Survey Monkey SUBMISSION Website
(DO NOT USE UNTIL SUBMITTING – NOT FOR TESTING)

https://www.surveymonkey.com/r/RotaryD5240Awards
Officially Forwarding Awards Submission

READ BEFORE CONTINUING
You might want to download the 2019-20 Awards Criteria Word document and fill that out before entering your responses here. Once you enter your responses, you will NOT be able to go back and edit them.


If you are ready to begin entering your Club's Award Information, click the NEXT button below.

Next
Officially Forwarding Awards Submission

The official Awards Submission window to use this website opens from:

May 1, 2020 through

May 15, 2020 until 11:59PM PST

This is a one month delay due to the coronavirus!

There is only one common submission for Regional and District awards. You do not need to submit again!

You may use the Rotary 4-Way Test to take credit for actions to satisfy Item criteria to occur before the end of the Rotary 2019-20 year.
Officially Forwarding Awards Submission

The Awards Chair should:
1) manually enter the points by slider or field into Survey Monkey and
2) retype or cut & paste the comments into Survey Monkey*
from your Award Criteria Word file using the pre-submission preparation work you and your
Club Board Directors/Committee Chairs did and saved into this Word document.

* Detailed comments are VERY important and will be used to break ties!

Each Section has a “Prev” and “Next” green button that lets you advance to the next Section. Except for the first
Section where Club data MUST be entered, all subsequent Sections can be skipped with the “Next” button.
Hence, every Club should submit even if they feel they only excelled in one of the 8 Areas!

After all information is entered into Survey Monkey, a summary will be shown which can be copied and pasted
into a file or directly printed. **Make sure to print your submission for your own records!**

**Also be sure to save your completed Award Criteria Word file as a backup** in case any problem arises
with Survey Monkey or its underlying database that requires us to ask Clubs to email in their completed
Award Criteria Word file. We do not anticipate needing this since Survey Monkey is a tried and proven
software but having a contingency plan is always a good idea!
Regional Awards Celebrations

Awards this year are bracketed so the small, medium, and large Club Regional winners in the 8 Areas and Best Regional Club by size from the 4 Regions will be recognized on June 1st on the District website, on the District Facebook page, and in the District Newsletter and will advance to District Awards.

Group Rotarians of Action in the Regions will advance to District Awards to determine the District Rotarian of Action.

The four Regional Awards Celebration in-person events are CANCELLED due to the corona virus!
District Awards Celebration and DG Stepdown

The small, medium, and large Club District winners in the:
  8 Areas,
  Silver, Gold, and Platinum Metal Awards, and
  Best District Club by size and Best District Overall Club
will be announced.

Peace Builder Clubs will be recognized.

Individual District Rotarian Awards will also be announced.

Cost will be kept low to attend this District event.

District Event: Sat Jun 27, 2020; 12:00 PM - 3:00 PM; Carpinteria Boys & Girls Club - 4849 Foothill Rd., Carpinteria, CA 93013
QUESTIONS?
Foundation

David Gore
District Rotary Foundation Committee
Grants Subcommittee Chair
Past District Education & Training Chair
TRF Grants

- Global Grants (next slide)
- District Grants (following Global Grants)
Global Grants

- TRF controlled
- Minimum $35,000
- Matches from DDF & TRF
- Max D5240 DDF = $18K/grant. Max TRF $400,000/grant.
- Grant $s up front
- Must meet at least 1 Area of Focus, be sustainable
- Usually multi-year
- Year round applications. One application/6 months/club.
- D5240 Policy Manual: in FILES section of rotarydistrict5240.org/sitepage/2020-2021-grants-qualification
TRF Rules: TRF minimum contribution request = $15,000. TRF matches DDF $1:$1. TRF matches cash 50 cents:$1.

District Rule: DDF from the District must be matched by cash from clubs or other donors.

Therefore, minimum budget is $35,000, as shown below

<table>
<thead>
<tr>
<th>Cash</th>
<th>DDF</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club Contribution</td>
<td>$10,000</td>
<td>$10,000</td>
</tr>
<tr>
<td>D5240 Contribution</td>
<td></td>
<td>$10,000 $10,000</td>
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<tr>
<td>TRF Contribution</td>
<td>$5,000</td>
<td>$10,000 $15,000</td>
</tr>
<tr>
<td>Minimum Grant</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
District Grants

- District controlled
- No minimum
- $ for $ match (by District) up to Club’s DDF limit, based on contributions prior 3 years
- No max $ limit on total project
- Reimbursement basis
- Many AOS projects qualify: international & local
- Complete w/in a single Rotary year
- Strict application schedule
- D5240 Policy Manual: in FILES section of rotarydistrict5240.org/sitepage/2020-2021-grants-qualification
District Grant Calendar 2020-2021

- Dec. 2019: DDF allocations published on District website
  (rotarydistrict5240.org/sitepage/2020-2021-ddf-allocations)
- 2019-20: Club **Qualification** seminar/webinar – **Required**
  - President-Elect + one other member must attend
- **Certification**: MOU signed (Pres & PE) & sent to Grants Chair (davcgor@gmail.com)
- January 15 – **March 31, 2020**: Round 1 Grant applications due
- April 1 – June 30, 2020: Round 2 applications, if DDF remains
- July 1, 2020: Projects start
- **June 30, 2021**: Projects completed & Final Reports Due
As of March 17 (latest data available)

- Total DDF available: $132K
- Total DDF requested: $61K
- Total Grant Applications: 18
- Total Clubs submitting grant applications: 12

Deadline is March 31 → 10 Days remain to get your grant applications to grantapplication@district5240.org

Still need MOU?
https://www.rotarydistrict5240.org/sitepage/2020-2021-trf-club-mou-resolution-for-incorpo

Questions: Dave Gore davcgor@gmail.com, 805-705-8474
Beyond Club President

David Gore
Rotary District 5240
Past District Education & Training Chair
Beyond Club President District Service
Beyond Club President

District Service
## District Organization Chart

**District Governor**
- Deb Linden (San Luis Obispo)

**District Executives**
- Dana Moldovan (Newbury Park)
- Scott Phillips (Goleta Noontime)
- Savi Bhim (Simi Sunrise)
- Melinda Thomas (E-Club of One World)
- Jeff King (Pismo Beach-Five Cities)
- Melinda Thomas (E-Club of One World)
- Chris Teaford (San Luis Obispo)
- Berni Ann Lewis (SLO Daybreak)
- Anil Garg (Simi Valley)
- Sandi Schwartz (Bakersfield East)

Beyond Club President
District Service
Beyond Club President

District Service

• DG 2020-2021: DEB LINDEN
  • rotarylinden@gmail.com

• DG 2021-2022: DANA MOLDOVAN
  • danamol@gmail.com

• DG 2022-2023: SCOTT PHILLIPS
  • scottdg2223@rotary5240.com
ANY QUESTIONS?
Wrapping Up Your Year

Richard Grossman
Rotary District 5240
Chief Operating Officer
Supporting the Team

Bruce McGee
Rotary District 5240
Executive Assistant Governor
Region 3
Work with your PE NOW - Tackle key issues:

• Ask what they need to encourage and coach them, offer to meet or call weekly during first few months as needed.

• Let them make mistakes and try new ideas so they learn but be in background to support.

• Start meeting now with PE on who has been appointed as Board members and committee chairs. Help them to be sure each person is in right position “on the bus” to ensure continuity in leadership and service projects.

• Coach President on how to run the BOD meeting to set goals and build accountability.
Work with your PE Now...

• Help plan agenda of first three Board of Director meetings then continue to attend those meetings through the year. Encourage Board to follow a planning timetable of upcoming events, goals and RI and legal posting deadlines.

• Have PE run a meeting now, if they have not, even if it is online!

• Encourage last few Past Presidents to meet quarterly with new President to review how Club is tracking on its goals. This needs to be non-threatening and diplomatic with current President using coaching and support. This is a perfect group to work on leadership succession and the Presidential step-down celebration.