



**ONE WORLD ONE ROTARY**



# **2020 District Training Assembly Presidents Session**

**March 21, 2020**



Savi Bhim  
District Governor  
2019-2020  
District 5240

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





# ONE WORLD ONE ROTARY



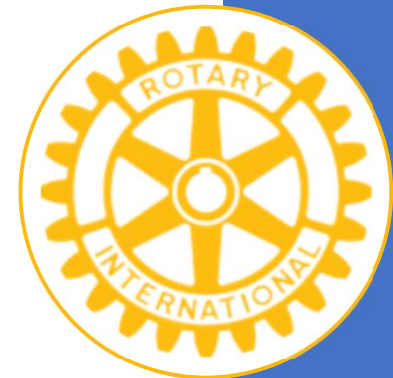
Savi Bhim  
District Governor  
2019-2020  
District 5240

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



# *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](mailto: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)

District Membership Goal **	01 July Membership	Current Membership	Membership Net Growth (%)	Distance to Membership Goal
3,499	3,145	3,121	-0.76%	378

# 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):

1)	57884	Carpinteria Morning	+21
2)	659	Camarillo	+10
3)	22723	Westlake Village Sunrise	+9
4)	21788	Santa Maria-Breakfast	+8
5)	667	Goleta	+8

# 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](mailto:bsfarrenkopf@gmail.com)

**805-908-1095**



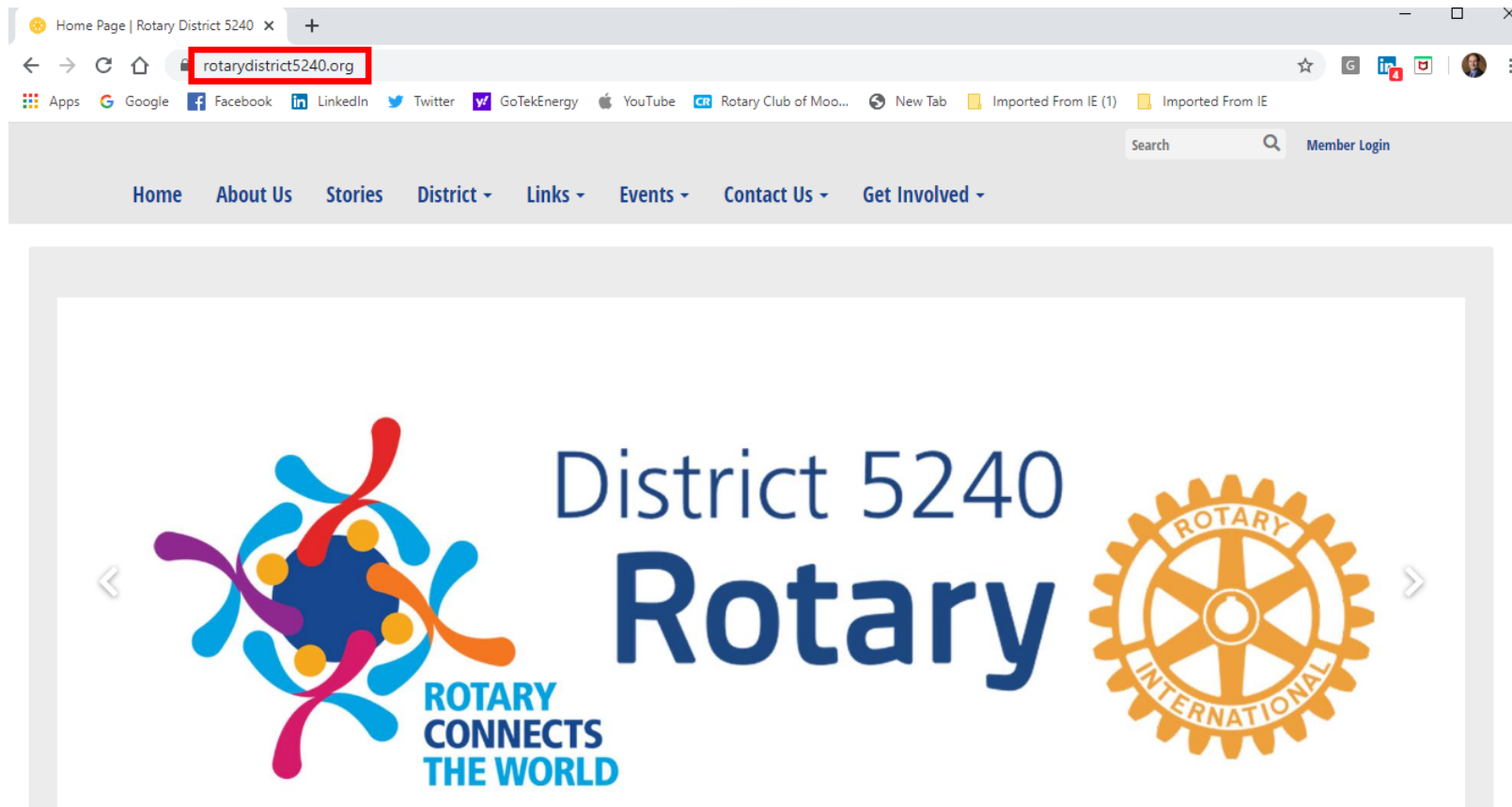
# Session Take-Aways

- 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

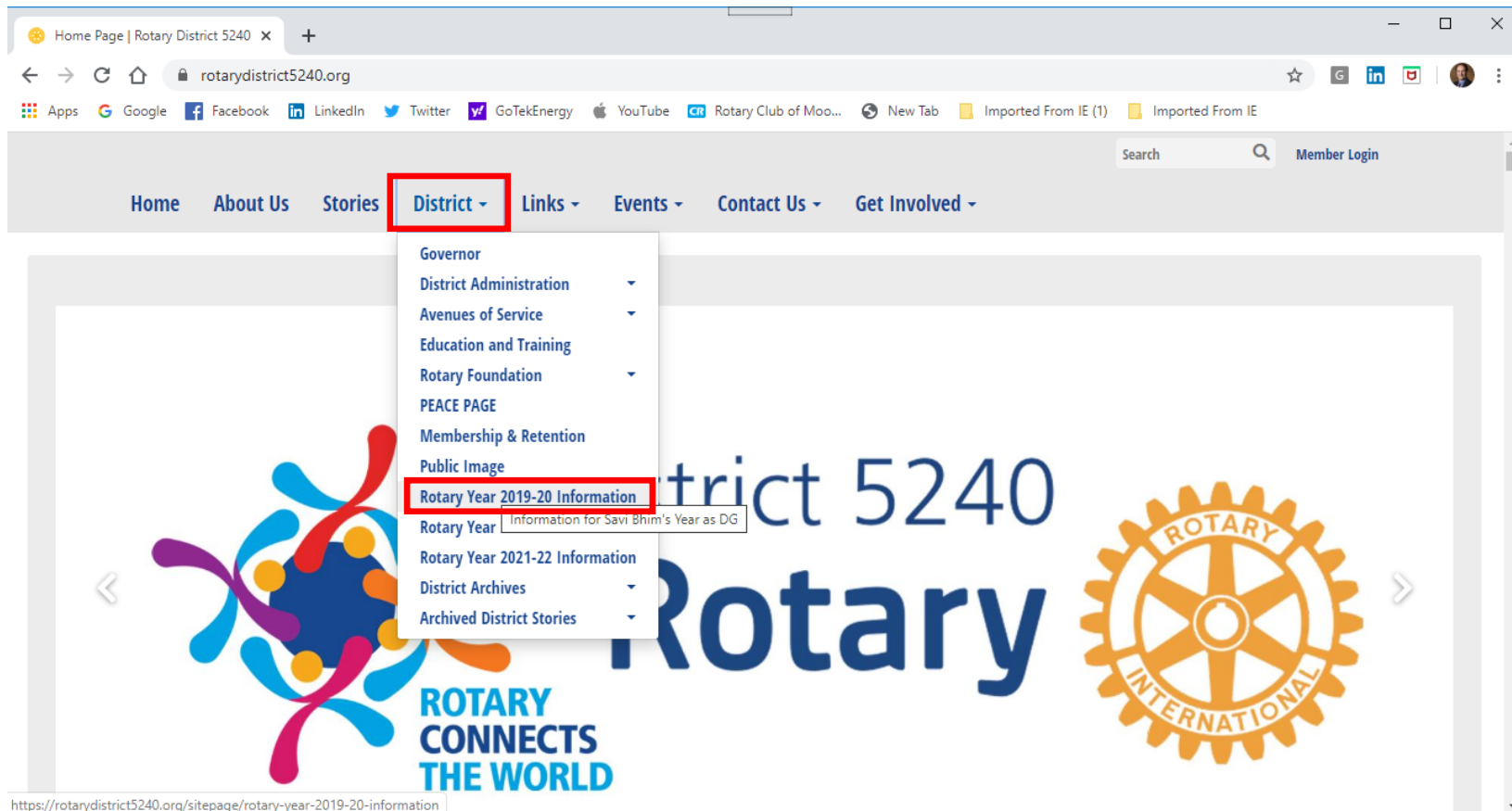
- 1) The common Regional and District **online awards submission date will be moved** from 11:59PM on April 15, 2020 to 11:59PM on May 15, 2020 (a 1 month delay)
- 2) All four in-person **Regional Awards Celebrations will be cancelled**
- 3) **Regional award winners will be announced on June 1, 2020** 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



District 5240 Training Assembly 2020

# How to Download Awards Criteria



District 5240 Training Assembly 2020


# How to Download Awards Criteria

Welcome | Rotary District 5240 x +

rotarydistrict5240.org/sitepage/rotary-year-2019-20-information


Apps Google Facebook LinkedIn Twitter GoTekEnergy YouTube Rotary Club of Moo... New Tab Imported From IE (1) Imported From IE

- DG Club Visit Calendar 2019-2020
- Essentials Changes for Clubs and District
- 2019-2020 Calendar
- D5240 Budget 2019-2020
- 2019-2020 President Elect Roster- Login Required
- District 5240 Awards Criteria**
- Rotary District 5240 Group Rotarian of Action
- Region & District Awards Bracket
- Rotary Citation - Rotary Clubs
- Rotary Citation Brochure - Rotary & Rotaract & Interact Clubs
- 2019-20 District 5240 Awards Website Submission Links



## 2019-2020 District Shirt

"One world, One Rotary"



2019-20-District-....docx ^ Assembly 2020



# 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

 **Saei Ikhim**  
District Governor 2019-2020  
Rotary International District 5240  
Ventura, Santa Barbara, San Luis Obispo, Kern  
Counties 

**ROTARY DISTRICT 5240**  
**DISTRICT/REGION AWARDS CRITERIA**  
**FOR ROTARY CLUBS**  
**ROTARY YEAR 2019-2020**

**DISTRICT 5240 AWARDS CHAIR**  
**B. SCOTT FARRENKOPF**  
**EMAIL: [BFARRENKOPF@GMAIL.COM](mailto:BFARRENKOPF@GMAIL.COM)**

**DISTRICT 5240 AWARDS SUBCHAIR**  
**TIM TRUJILLO**  
**EMAIL: [TIM-TRUJILLO@EARTHLINK.NET](mailto:TIM-TRUJILLO@EARTHLINK.NET)**

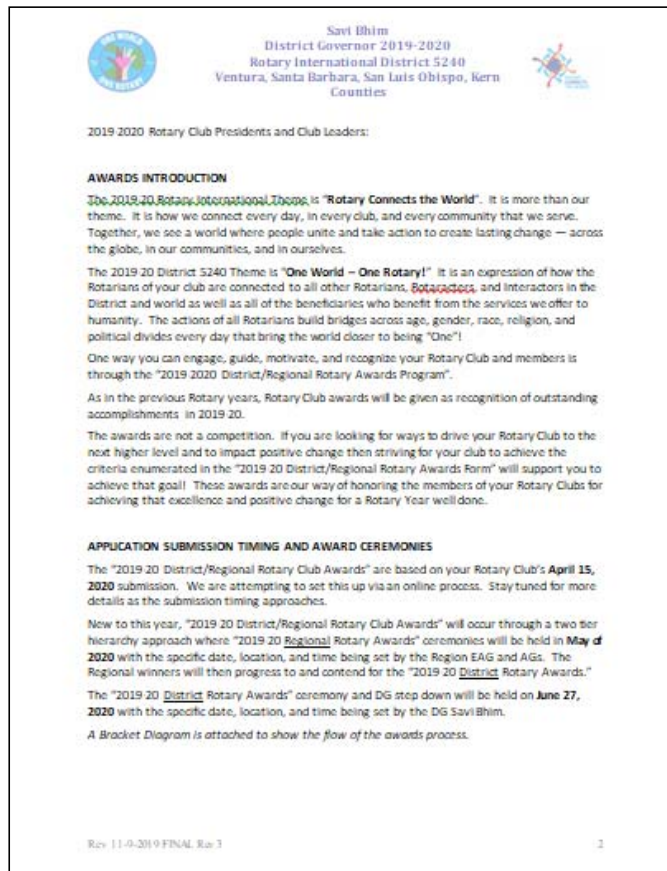
Rev 11-9-2019 FINAL Rev 3

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”

# Preparing for Awards Online Submission

Savi Bhim  
District Governor 2019-2020  
Rotary International District 5240  
Ventura, Santa Barbara, San Luis Obispo, Kern  
Counties

(Please complete club contact information)

Club: \_\_\_\_\_

Club Size: ☐ 1-35/Small ☐ 36-70/Medium ☐ 71+/Large

Club President: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Awards Chair: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Rev 11-9-2019 FBAL Rev 3

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 (*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	Club	Club Name	Total Members @ 1 July 2019	Club Size
5240	82338	Bakersfield Twilight	30	SMALL
5240	73587	Buellton	15	SMALL
5240	22172	Camarillo Sunrise	18	SMALL
5240	661	Carpinteria	35	SMALL
5240	87818	Carpinteria Sunset	21	SMALL
5240	78654	Cayucos	27	SMALL
5240	68062	Central Coast-Passport, D5240	22	SMALL
5240	664	Conejo Valley	24	SMALL
5240	665	Delano	13	SMALL
5240	666	Fillmore	34	SMALL
5240	25047	Goleta Noontime	21	SMALL
5240	63354	Grover Beach	17	SMALL
5240	28363	Indian Wells Valley (Inyokern)	7	SMALL
5240	668	Kern River Valley	19	SMALL
5240	57138	Los Olivos	35	SMALL
5240	24747	Los Osos	26	SMALL
5240	78837	Moorpark Morning	22	SMALL
5240	21608	Newbury Park	22	SMALL
5240	22212	Ojai West	33	SMALL
5240	662	Oxnard Sunrise	16	SMALL
5240	31879	Paso Robles Sunrise	22	SMALL
5240	51109	San Luis Obispo Daybreak	32	SMALL
5240	673	Santa Barbara North	32	SMALL
5240	687	Santa Maria South	31	SMALL
5240	684	Santa Ynez Valley	32	SMALL
5240	685	Shafter	23	SMALL
5240	688	Taft	26	SMALL
5240	56814	Templeton	18	SMALL
5240	84838	The Five Cities ECO	14	SMALL
5240	690	Vandenberg Village	13	SMALL
5240	694	Wasco	20	SMALL

District	Club	Club Name	Total Members @ 1 July 2019	Club Size
5240	651	Arroyo Grande	40	MEDIUM
5240	652	Atascadero	52	MEDIUM
5240	654	Bakersfield Breakfast	61	MEDIUM
5240	655	Bakersfield East	56	MEDIUM
5240	656	Bakersfield North	48	MEDIUM
5240	659	Camarillo	54	MEDIUM
5240	660	Cambria	59	MEDIUM
5240	57884	Carpinteria Morning	39	MEDIUM
5240	663	China Lake	41	MEDIUM
5240	84535	E-Club of One World D5240	63	MEDIUM
5240	667	Goleta	45	MEDIUM
5240	669	Lompoc	41	MEDIUM
5240	670	Montecito	43	MEDIUM
5240	671	Moorpark	45	MEDIUM
5240	672	Morro Bay	58	MEDIUM
5240	50285	Nipomo	37	MEDIUM
5240	675	Oxnard	45	MEDIUM
5240	21683	Pismo Beach (Five Cities)	48	MEDIUM
5240	681	Santa Barbara	69	MEDIUM
5240	22470	Santa Barbara Sunrise	45	MEDIUM
5240	682	Santa Maria	37	MEDIUM
5240	21788	Santa Maria-Breakfast	65	MEDIUM
5240	683	Santa Paula	70	MEDIUM
5240	58600	Simi Sunset	37	MEDIUM
5240	686	Simi Valley	52	MEDIUM
5240	22626	Solvang	57	MEDIUM
5240	24714	Tehachapi	36	MEDIUM
5240	692	Ventura East	47	MEDIUM
5240	693	Ventura South	42	MEDIUM
5240	695	Westlake Village	55	MEDIUM
5240	22723	Westlake Village Sunrise	53	MEDIUM

District	Club	Club Name	Total Members @ 1 July 2019	Club Size
5240	653	Bakersfield	145	LARGE
5240	658	Bakersfield West	78	LARGE
5240	674	Ojai	78	LARGE
5240	677	Paso Robles	97	LARGE
5240	680	San Luis Obispo	102	LARGE
5240	21978	San Luis Obispo de Tolosa	78	LARGE
5240	23930	Simi Sunrise	95	LARGE
5240	689	Thousand Oaks	116	LARGE
5240	691	Ventura	96	LARGE

# Preparing for Awards Online Submission

Savi Ithim  
District Governor 2019-2020  
Rotary International District 5240  
Ventura, Santa Barbara, San Luis Obispo, Kern  
Counties

**District 5240 Awards & Recognition Program – Community Service 2019-2020**

Recognition awards for Club actions/goals achieved from July 1, 2019 to April 15, 2020. Some criteria exist in more than one category. The "Explain" box will expand as you briefly describe what you did.

**Community Service Recognition (Club size: 1-35 = small, 36-70 = medium, 71+ = large)**

Acquire at least 80% (large Club), 70% (medium Club), or 80% (small Club) of the possible section points from the following:		<b>Total Points Achieved:</b> Minimum L Pts. Required: 39 Minimum M Pts. Required: 34 Minimum S Pts. Required: 29 <b>Minimum Pts. Met (Y/N):</b> <b>Total Points Possible: 48</b> <b>Percentage Achieved:</b>
1	Conduct a "Community Needs Assessment" to help the Club understand the kinds of local projects that would be impactful. (1 point)	
0	Explain if completed:	
2	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, <del>Rotary</del> members, and/or Interact members. (5 points up to 5 points if <del>Rotary</del> 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)	
0	Explain if completed:	
3	Conduct a new or continuing Community Service Project involving at least one other club in your Group with high visibility and media coverage. (3 points)	
0	Explain if completed:	
4	Participate in a "Rotarians at Work Day" with Rotarians and family members, <del>Rotary</del> members, and/or Interact members. (2 points up to 3 points if <del>Rotary</del> and/or Interact are included) (Rotary Citation criteria 2)	
0	Explain if completed:	
5	Submit a District Grant Application for a project that supports your community. (2 points)	
0	Explain if completed:	
6	Continue or establish a partnership with a non-Rotary organization (corporate, governmental, or nongovernmental entity) and implement and work together on a Community Service project. (2 points) (Rotary Citation criteria 16A)	
0	Explain if completed:	
7	Present a Community Service Award to a non-Rotarian at a club meeting or event (photo, video, or Certificate). (1 point)	
0	Explain if completed:	
8	Increase the number of members involved in community service projects by ensuring that every Club member participates in at least one community service project. (3 points) (Rotary Citation criteria 11A)	
0	Explain if completed:	
9	Goodwill another Community Service project or activity unique to your Club not previously listed above. (1 point up to 2 points if a multi-club activity)	
0	Explain if completed:	
10	Submit a Community Service story with a photo on the District website at <a href="http://www.rotary.org/district5240">www.rotary.org/district5240</a> (look on District Website under "Contact Us" menu for "Submitting Club Service" instructions). (1 point)	
0	Explain if completed:	

Rev. 11-0-2019 FINAL Rev. 1

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

Savi Ibhim  
District Governor 2019-2020  
Rotary International District 5240  
Ventura, Santa Barbara, San Luis Obispo, Kern  
Counties

**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)

<b>PLUG: MUST COMPLETE AT LEAST FOUR (4) of the following:</b>	<b>Total Points Achieved:</b> <b>Minimum Points Required: 4</b> <b>Minimum Pts. Met (Y/N):</b> <b>Total Points Possible: 15</b> <b>Percentage Achieved:</b>
1. 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 Clubmen w Distinction criteria 1 – Large Club)	
0 Explain if completed:	
2. Attain a membership Retention Rate of 80% (Members as of July 1, 2019 thru April 15, 2020). (1 point)	
0 Explain if completed:	
3. Participate in at least 1 Branding activity through electronic, broadcast, or print media. (1 point)	
0 Explain if completed:	
4. Club per capita contribution of at least \$120 to the TRF Annual Programs Fund. (1 point)	
0 Explain if completed:	
5. Club per capita contribution of at least \$25 to the TRF Polo Plus Fund. (1 point)	
0 Explain if completed:	
6. Qualify Club for District and Global Grants (1 point)	
0 Explain if completed:	
7. District Conference Attendance is 3% of Club (includes family, guests, Interact). (1 point)	
0 Explain if completed:	
8. Has an identified Club President for 2021-2022 (PEN). (1 point)	
0 Explain if completed:	
9. Participation level of 70% of Officers & Committee Chairs at the District Training Assembly. (1 point)	
0 Explain if completed:	
10. Participation level of President, PE, and PEN at the District Midterms. (1 point)	
0 Explain if completed:	
11. Participation level of 1 member at a District Membership or Foundation Seminar. (1 point)	
0 Explain if completed:	
12. Total of at least 1 NEW Basic or Master PRLS graduate. (1 point)	
0 Explain if completed:	
13. Total of at least 1 NEW Benefactor or Bequest Society member. (1 point)	
0 Explain if completed:	
14. Total of at least 1 NEW Paul Harris Fellow. (1 point)	
0 Explain if completed:	
15. Total of at least 1 NEW Paul Harris Society member. (1 point)	
0 Explain if completed:	
16. Become a Peace Builder Club (see <a href="https://www.rotary.org/district5240.org/peacebuilderaccessor1">https://www.rotary.org/district5240.org/peacebuilderaccessor1</a> ). (1 point)	
0 Explain if completed:	

Rev 11-9-2019 FINAL, Rev 3 23

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

# Preparing for Awards Online Submission

Row 1	1 <i>Item</i>	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)
Row 2	8 <i>Points</i>	Explain if completed: We also appointed 3 Fundraising Event Chairs. <span style="float: right;"><i>Comments</i></span>

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

2	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]
0	Explain if completed:
4	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]
0	Explain if completed:

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

The screenshot shows the Rotary Club Central website at [rcc.rotary.org/#/goals](http://rcc.rotary.org/#/goals). The user is logged in as B. Farrenkopf. The page is titled "2019-20 Moorpark Goals" and features a sidebar with navigation links: Dashboard, Goal Center (selected), Global View, Service Activities, Resources, Reports, Club Ratings, Contact Us, and My Rotary. The main content area has tabs for Members & Engagement, Rotary Foundation Giving, Service, Young Leaders, Public Image, Rotary Citation, and All. Below the tabs, there are "SAVE" and "CANCEL" buttons. A text prompt asks: "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." A "Sort selected goals" link is also present. A table lists goals, with the first entry highlighted: "Club Membership Committee" with a link to "Hide goal details and history". To the right of the goal name is a red-bordered box containing a toggle switch for "ACHIEVEMENT" (set to "NO") and a checkbox for "SELECT GOAL". Below the goal name, the description reads: "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

<b>Acquire at least 80% (large Club), 70% (medium Club), or 60% (small Club) of the possible section points from the following:</b>	<b>Total Points Achieved:</b> <b>Minimum L Pts. Required: 53</b> <b>Minimum M Pts. Required: 47</b> <b>Minimum S Pts. Required: 40</b> <b>Minimum Pts. Met (Y/N):</b> <b>Total Points Possible: 66</b> <b>Percentage Achieved:</b>
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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

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**Rotary**  
District 5240

## 2019-20 District Awards - TEST

### 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.

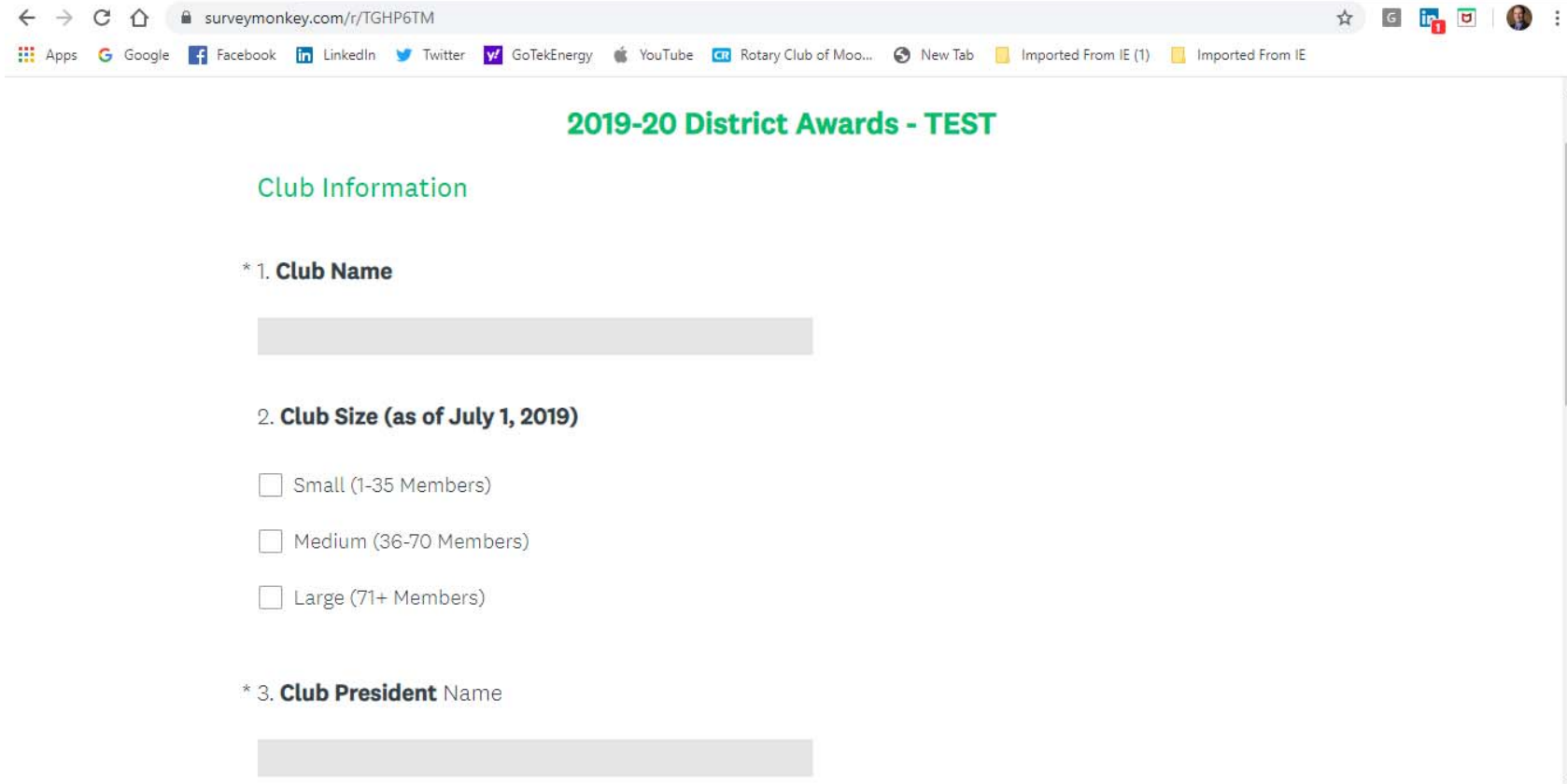
To download the Awards, go to [https://clubrunner.blob.core.windows.net/00000050008/en-ca/files/sitepage/rotary-year-2019-20-information/district-5240-awards-criteria/2019-20-District-5240-Rotary-Club-Awards-Criteria\\_9Nov19.docx](https://clubrunner.blob.core.windows.net/00000050008/en-ca/files/sitepage/rotary-year-2019-20-information/district-5240-awards-criteria/2019-20-District-5240-Rotary-Club-Awards-Criteria_9Nov19.docx)

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**

Powered by

# Experimenting with Awards Online Submission



The screenshot shows a web browser window with the address bar displaying "surveymonkey.com/r/TGHP6TM". The browser's toolbar includes various icons for social media and search engines. The main content area of the browser displays a survey form titled "2019-20 District Awards - TEST" in green text. Below the title, the section "Club Information" is also in green. The form contains three required questions, each marked with an asterisk:

- \* 1. Club Name**: A single-line text input field.
- \* 2. Club Size (as of July 1, 2019)**: A group of three radio button options:
  - ☐ Small (1-35 Members)
  - ☐ Medium (36-70 Members)
  - ☐ Large (71+ Members)
- \* 3. Club President Name**: A single-line text input field.

# Experimenting with Awards Online Submission

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## 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)

0 8

10. Explain if completed

# Experimenting with Awards Online Submission

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## 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



# Experimenting with Awards Online Submission

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## 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

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**Rotary**  
District 5240

## 2019-20 Rotary District 5240 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.

To download the Awards Criteria, go to [https://clubrunner.blob.core.windows.net/00000050008/en-ca/files/sitepage/rotary-year-2019-20-information/district-5240-awards-criteria/2019-20-District-5240-Rotary-Club-Awards-Criteria\\_9Nov19.docx](https://clubrunner.blob.core.windows.net/00000050008/en-ca/files/sitepage/rotary-year-2019-20-information/district-5240-awards-criteria/2019-20-District-5240-Rotary-Club-Awards-Criteria_9Nov19.docx)

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 1<sup>st</sup> 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!

# CANCELLED

# 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?



District 5240 Midterms  
Presidents Session  
January 25, 2020



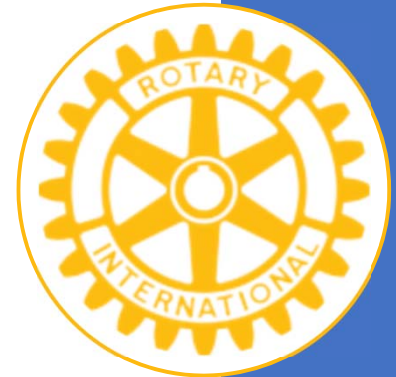
# *Foundation*

**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](https://rotarydistrict5240.org/sitepage/2020-2021-grants-qualification)

# Global Grants

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

	Cash	DDF	Total
Club Contribution	<b>\$10,000</b>		\$10,000
D5240 Contribution		<b>\$10,000</b>	\$10,000
TRF Contribution	\$5,000	\$10,000	<b>\$15,000</b>
Minimum Grant			<b><u>\$35,000</u></b>

# 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](https://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](http://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](mailto: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

# District Grant Calendar 2020-2021

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](mailto:grantapplication@district5240.org)

Still need MOU?

<https://www.rotarydistrict5240.org/sitepage/2020-2021-trf-club-mou-resolution-for-incorpo>

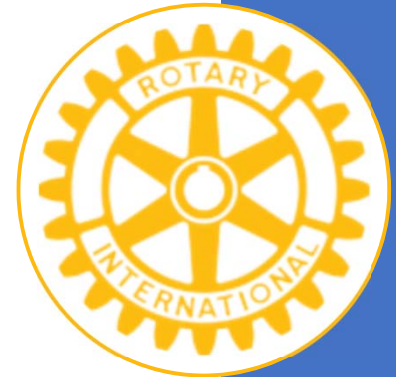
Questions: Dave Gore [davcgor@gmail.com](mailto:davcgor@gmail.com), 805-705-8474

# *Beyond Club President*

**David Gore**

**Rotary District 5240**

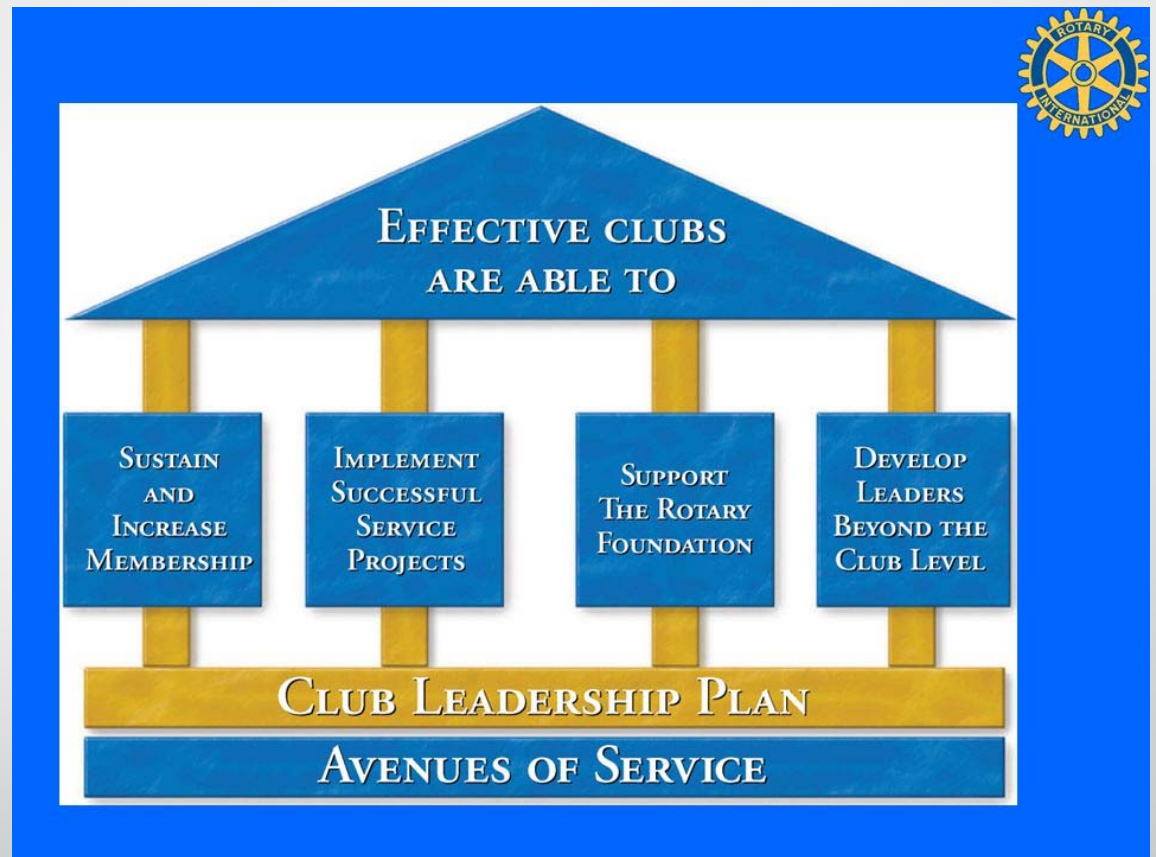
**Past District Education & Training Chair**





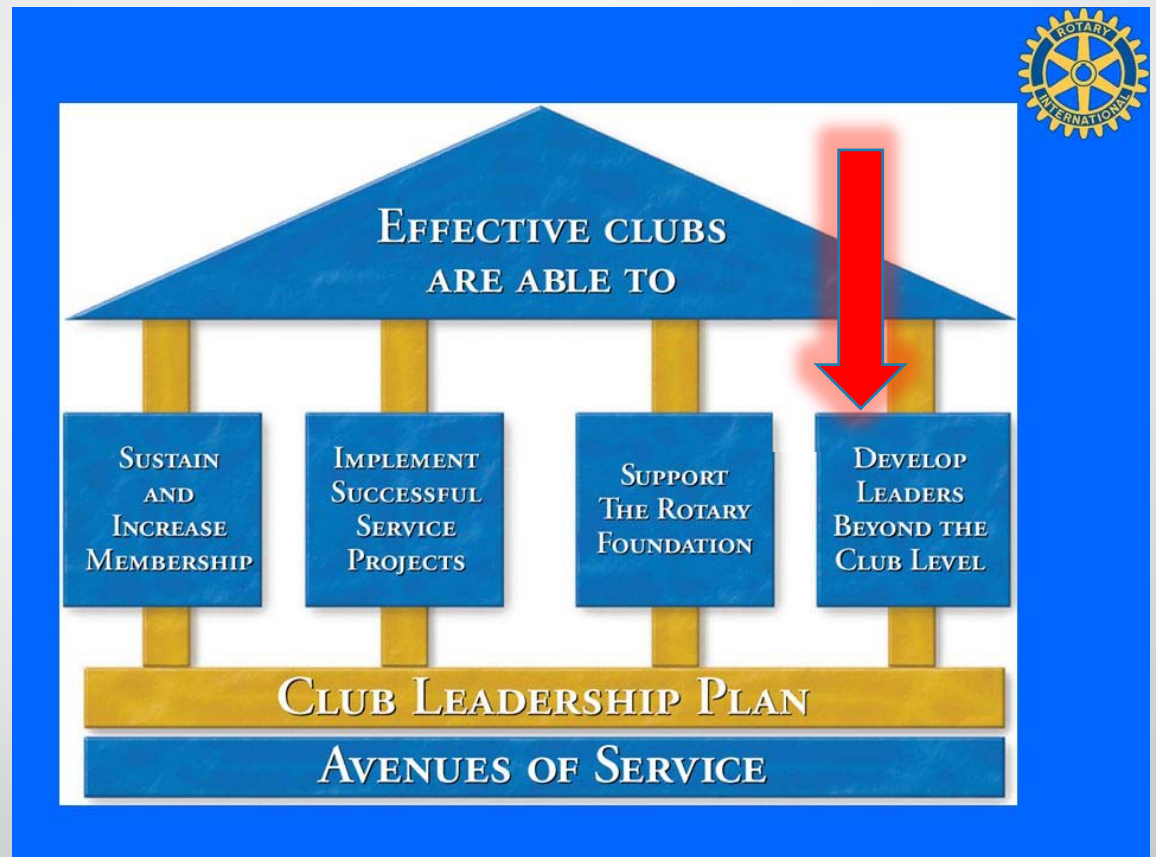
Beyond  
Club  
President

District  
Service



Beyond  
Club  
President

District  
Service



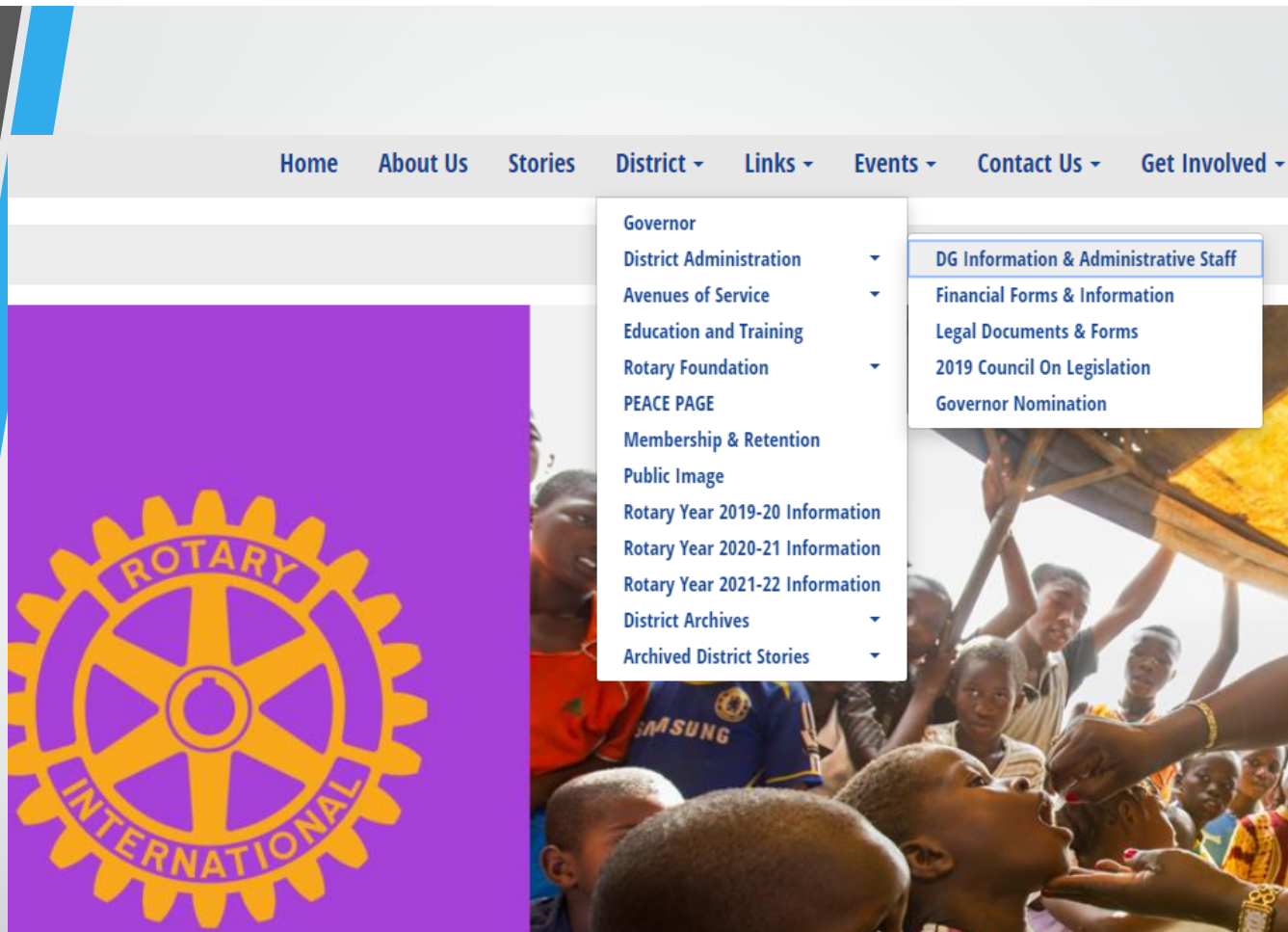
Beyond  
Club  
President

District  
Service

**WHY?**

# Beyond Club President

## District Service



Beyond  
Club  
President


District  
Service

## DISTRICT ORGANIZATION CHART

<< Previous Year | **Current Year: 2020-2021** | Next Year >>

### District Governor

District Governor

 [Deb Linden \(San Luis Obispo\)](#)

### District Executives

District Governor Elect

 [Dana Moldovan \(Newbury Park\)](#)

District Governor Nominee

 [Scott Phillips \(Goleta Noontime\)](#)

Immediate Past District Governor

 [Savi Bhim \(Simi Sunrise\)](#)

Chief Operating Officer

 [Melinda Thomas \(E-Club of One World\)](#)

Chief of Staff

 [Jeff King \(Pismo Beach-Five Cities\)](#)

Director at Large

 [Melinda Thomas \(E-Club of One World\)](#)

Finance Committee Chair

 [Chris Teaforde \(San Luis Obispo\)](#)

DG Schedule Coordinator

 [Berni Ann Lewis \(SLO Daybreak\)](#)

Audit Committee Chair

 [Anil Garg \(Simi Valley\)](#)

District Secretary

 [Sandi Schwartz \(Bakersfield East\)](#)

# Beyond Club President

## District Service

- DG 2020-2021: DEB LINDEN
  - [rotarylinden@gmail.com](mailto:rotarylinden@gmail.com)
- DG 2021-2022: DANA MOLDOVAN
  - [danamol@gmail.com](mailto:danamol@gmail.com)
- DG 2022-2023: SCOTT PHILLIPS
  - [scottdg2223@rotary5240.com](mailto:scottdg2223@rotary5240.com)

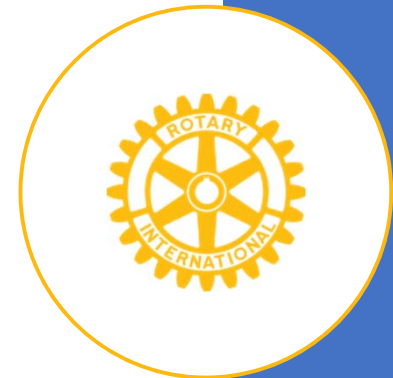




ANY QUESTIONS?

# *Wrapping Up Your Year*

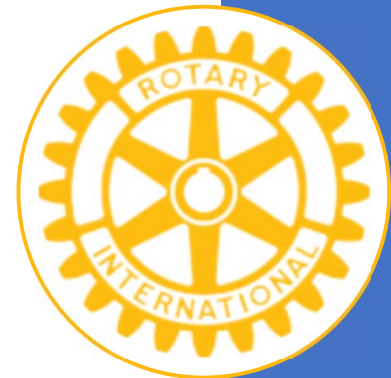
**Richard Grossman**  
**Rotary District 5240**  
**Chief Operating Officer**





# *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.





*Thank  
You*