

2017-18 Budget Rationale for D-6270

These notes have been prepared to provide information on notable changes from the current budget contained in the proposed 2017-18 annual operating budget

Background

During the 2015-2016 Rotary year, Rotarians participated in 13 District focus groups (100% Rotary Club participation by hundreds of Rotarians). A District Leadership Visioning session in November 2016 utilized focus group feedback to identify areas for improvement. Based on this, a 3-year District 6270 strategic plan focusing on membership, public image and training was developed and adopted.

The 2016-17 budget was aligned with the 2016-19 District Strategic Plan. While much of the 2016-17 budget was a continuation of successful activities already under way, the budget proposed changes in three major areas: increased support for Membership, Public Image and Training. A one-time Public Image Grant program totaling \$25,000 was initiated and funded in 2016-17.

At the 2016 annual meeting, District Dues remained the same, but a 3-year assessment of \$10 per District Rotarian was added for Membership, Public Image and Training initiatives.

Accomplishments related to the special assessment have included:

- Six evening One Rotary Summit training workshops conducted across District 6270 that engaged hundreds of Rotarians.
- Enhanced Public Image advertising on television and in movie theatres.
- Pilot project working with five clubs on Membership.
- Increased offering of electronic communication and training through vehicles as Go to Meeting / Got to Webinar. Electronic Grant Training and training for club Secretaries and Treasurers.

Benchmarking. Annual District Dues for 2016-17, and proposed for 2017-18, are \$36 per District Rotarian. A survey of other Districts in Zones 28-29 revealed average per person dues of \$40.53, with minimum of \$30 and maximum of \$59 (\$4.50 higher on average than D6270). Twelve of the 18 Districts reporting have additional assessments for training, youth, conference, or other activities.

Continuations from 2016-17 into 2017-18

INCOME

Line 310. Public Image, Training and Membership. This reflects the second year (of 3-years) of an annual special assessment of \$10 per Rotary member. This was discussed and approved at the 2016 annual meeting. The purpose is to pay for special projects to enhance public awareness of Rotary, enhance training for Rotarians and provide focused support for membership enhancements. Projects are proposed by the Public Image, Training and Membership Committees, support the Strategic Plan, link to Budget Lines in the 57x, 58x and 59x series.

Budget Changes and Notes for 2017-18

INCOME

Line 304. Background Check Income. (Note) Actual Year to Date = \$38.85 (as of Jan. 2017). The expectation is that we should be realizing more revenue. A revenue amount was not budgeted.

2017-18 Budget Rationale for D-6270

Line 306. PETS Tuition. (Note) Registration is still \$275 per PE/Club (as it has been for the past few years) collected by the District. Registration fee for PENs who attend is paid directly.

EXPENSE

Line 555. DGND. (New) The DGND is selected in November/December. Added budget for activities of the DGND such as: PETS attendance District Conference Attendance.

Line 57x Membership. (Change) Allocate funds to club support and training related to membership rather than hiring a staff person as proposed in the 2016-17 budget and Strategic Plan with continuation in 2017-18. Change name to Administrative Assistant/Outside Services. Office Supplies - reduce by \$1,000 to \$1,000 total.

Line 58x Public Image. (New) Add new line for Zone Institute - anticipate 17-18 cost = \$1,500.

Line 59x Training / Trainer. Zone Institute. (Change & notes) Increase 17-18 amount to \$1,500. Midwest PETS - reduce amount by \$500 to \$2,000. Go to Meeting / Citrix - reduce by \$500 to total of \$2,000. Office Supplies - reduce by \$1,500 to total of \$500. Fall Seminar - moved to Training category. Given 16-17 experience, with six sessions of One Rotary Summit, and significantly increased number of attendees, increase allocation by \$3,500 for a total of \$5,000. Spring Assembly - moved to Training category.

Line 603. Electronic Communication. (Note). Includes Survey Monkey license and ClubRunner fees.

Line 619. Bookkeeping. (New). At \$20.00/hour for an estimated 10 hours/month = \$2,400. Person assist's District Treasurer.

Line 620. World Affairs Seminar. (Change) Increase allocation by \$1,000 to total support of \$19,000.

Line 622. District Directory. (Change) Increase allocation by \$500 to \$3,500 based on cost increase.

Line 624. PETS / Pre-PETS. (Note) Includes expenses for At-Large District representative to PETS Council from D6270 and that person's participation on Council.

Line 631. Contingency Fund. (Note) This was for District Grants.

Line 639. Public Relations. (Note) Re-Named: "Public Image Grant." This was a "one-time" activity. In 2017-18 amount should be \$0.00, as all funds will have been expended or committed by June 30, 2017.

Line 641. Zone - Emerging Leaders. (Change) Increase to \$4,500 (\$1,500 per person for 3 persons).

Line 644. Incorporation Legal Fees. (New) Allocate \$500 for 2017-18 as contingency.

Line 645. Group Cultural Exchange. (New) Allocate \$1,000 as seed money for the new Group Cultural Exchange proposed by RI PE Ian Riseley at the January 2017 International Assembly.