



Pre-Pets 1 Agenda – WELCOME!!



- Socialize / Fellowship
- Singapore – with Eric Schmautz, PDG
- Announcements/reminders
- Value of the District/Value of AG's
- Review the Budget
- Rotary Foundation/ DDF Timeline/ One Time DDF Surplus Funds
- Global Scholar Vote
- Hands On Awards
- Resources
- Calendar



PDG Eric Schmautz



Rotary International Singapore Convention Eric Schmautz, PDG



Let's Get Started



- AG/COS Introductions
- Why the Name Badges
- General Direction for the Year
- Plan for Today – and Going Forward



Reminders & Announcements



- *“Century of Service”*
- Invite us – visit other clubs – support & receive
- Donations to new club
- Respond the first time
- Conduit – not dam
- Tax Filings – due NLT Nov. 15, 2023

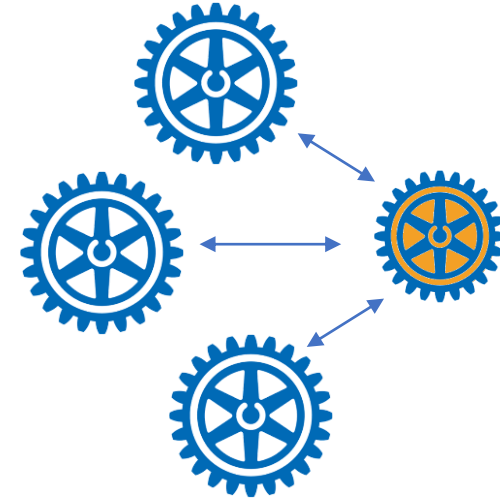


Value of the District



The District exists is to pull clubs together and provide **expertise**:

- Help Coordinate Club Projects
- Tools & Money
- Training
- Events

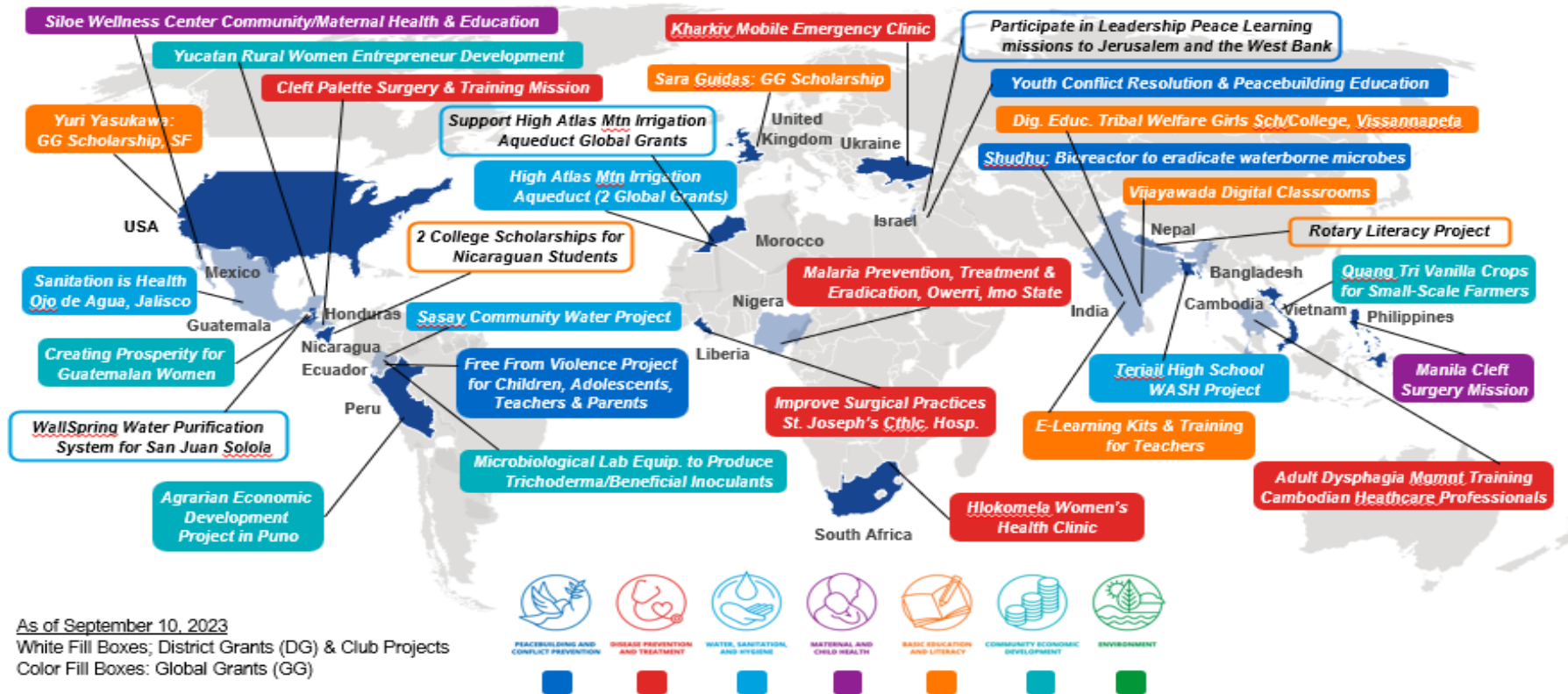




Value of the District: Help Coordinate Club Projects: International

\$2M AT WORK ACROSS THE GLOBE

5150 Global & Int. District grants in applied for, approved, or ongoing active stages 2023-2024





Value of the District: Help Coordinate Club Projects: Community





Value of the District: Tools and Money: Disaster Relief





Value of the District: Tools and Money Website



International forms a global network of business, professional, and community leaders who volunteer their time and talents to serve communities and form strong, lasting friendships in the process.

District Governor Message - September 2023

Happy September, Everyone.

Imagine: what would your daily life be like if you couldn't read? Whether accomplishing the tasks of daily living... like interpreting a recipe to programming your thermostat... or succeeding in your career, the ability to consume and comprehend information is critical.

September is **Basic Education and Literacy Month**. Literacy serves as the cornerstone of education and personal development. It equips a person with the skills to comprehend, analyze and communicate, enabling them to participate fully in civic life, access opportunities, and contribute meaningfully to their communities...

[Continue Reading](#)



Featured Events















[View Full District Calendar](#)



Value of the District: Tools and Money: Promote Club Events



Below is a list of club events submitted to the Rotary District 5150 [club event calendar](#), taking place over the next two months. Does your club have an upcoming event you'd like to have featured on the District website or in upcoming emails? View our [Guidelines for Submitting Events to the Calendar](#).

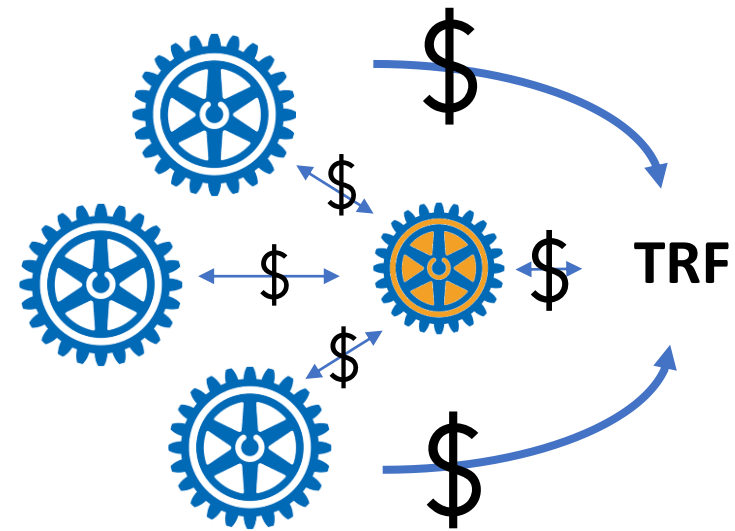
<p>17 Oct 2023</p> <p>ROTARY LUNCHEON: Glitz & Glamour!</p> <p> San Francisco Rotary Club  Oct 17, 2023 11:00 AM - 2:00 PM</p>	<p>28 Oct 2023</p> <p>District Global Grant Training: Hybrid Workshop</p> <p> Oct 28, 2023 9:00 AM - 12:00 PM</p>
<p>17 Oct 2023</p> <p> Rotary Means Business Presents The Hillbarn Theatre</p> <p> Oct 17, 2023 5:30 PM - 7:00 PM</p>	<p>30 Oct 2023</p> <p> The Flight to End Polio</p> <p> Oct 30, 2023 6:00 PM - 8:00 PM</p>
<p>21 Oct 2023</p> <p>The Hunt to End Polio</p> <p> Oct 21, 2023</p>	<p>04 Nov 2023</p> <p> Walk To End Alzheimer's</p> <p> Nov 04, 2023 9:00 AM - 12:00 PM</p>
<p>21 Oct 2023</p> <p>Octoberfest (Novato Sunrise)</p> <p> Oct 21, 2023 5:30 PM - 9:00 PM</p>	<p>18 Nov 2023</p> <p>Master PRLS 5 - Planning & Project Management</p> <p> Nov 18, 2023 8:30 AM - 3:30 PM</p>



Value of the District: Tools and Money The Rotary Foundation



Conduit between Clubs & TRF
Link for DDF/Grant Structure



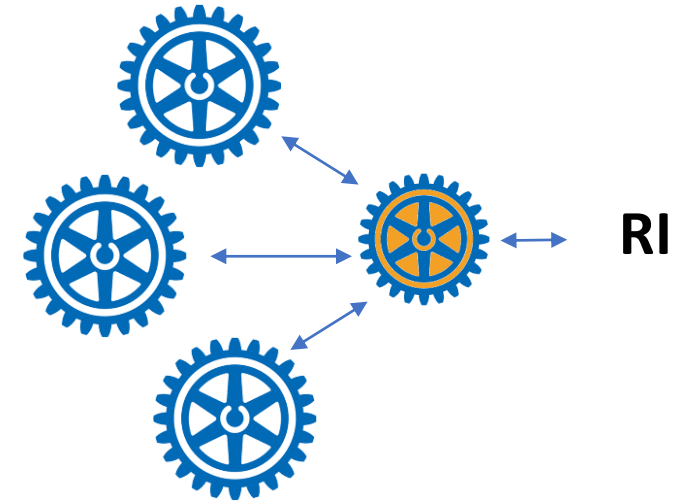
More on this later...



Value of the District: Tools and Money Conduit Between Clubs and Rotary International

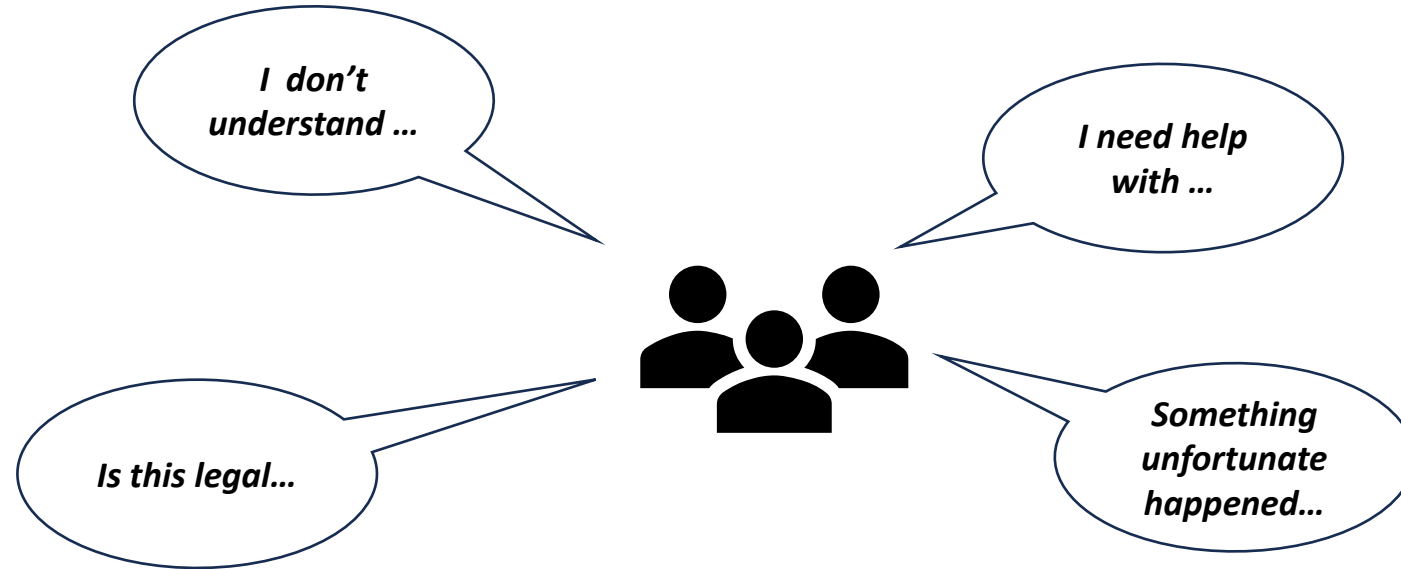


- ✓ Insurance
- ✓ Club/District Support
- ✓ Learning Center
- ✓ Rotary Club Central
- ✓ Brand Center





Value of the District: Assist Clubs when Questions & Issues Arise



**The District can find the expertise
The Assistant Governor is the first step**



Value of the District: Training PRESIDENT ELECT TRAINING SEMINAR (PETS)





Value of the District: Training Assembly & Project Fair 2024



Training for **ALL** Club Members and Leaders





Value of the District: Training District Committee Training





Value of the District: Events



Rotary District 5150 proudly presents:

THE HUNT

TO END POLIO



An URBAN SCAVENGER HUNT

SATURDAY, OCTOBER 21 at 9AM
 THE CANNERY, FISHERMAN'S WHARF, SAN FRANCISCO

Work in teams of up to four:

- Solve puzzles, win prizes
- See cool places in San Francisco
- Have fun & help kids worldwide
- Costumes encouraged!



All ages welcome
 Adults: \$75 Students: \$30
 Registration includes participation, donation, and lunch!



Net proceeds will go to Rotary International's global polio eradication efforts



Ticket sales end October 14th. Register online
HuntToEndPolio.com





Value of the District: Events



**YIPPEE
★ KI-YAY! ★
FOR
EREY**

Roping in Goodwill, Fun & Friendship
A Western Themed Party, Auction and EREY Drawing
Benefits Rotary International Annual Fund SHARE
The Long Branch Saloon & Farms

4pm - 10pm Saturday, November 18, 2023
321 Verde Road, Half Moon Bay
Rsvp by November 13, 2023

Western Attire Encouraged
Rotary5150.org/page/yippee

**CREATE HOPE
in the WORLD**



Value of the District: Events District Conference



BETTER TOGETHER
Rotary Multi-District Conference

5150
5180
5190

Three Districts, Triple the Fun!

Meet new friends and collaborate with Rotarians from across the Bay Area, Central Valley, and Sierra Nevada regions.

- World-Renown Speakers
- Awards & Celebration
- House of Friendship
- Fun for the entire family

Early Bird price through December 31, 2023:
Only \$295

Register Now!

May 17-19, 2024
Grand Sierra Resort
Reno, Nevada

Registration & more info:
Rotary5150.org/page/DisCon24

Rotary
Districts 5150, 5180, & 5190

CREATE HOPE
in the WORLD

Registration & more info:

Rotary5150.org/page/DisCon24



TOP TEN REASONS FOR OUR DISTRICT (The AG's List)



- 1) To Keep any DG from Serving More than One Year
- 2) Great Way to Recycle Club Past Presidents
- 3) PINS!!!! MORE ROTARY PINS!!!!!!!
- 4) Dress in Strange Costumes to Raise Money for Polio
- 5) Free Goodies (Backpacks, Tote Bags, Other Stuff!!!)
- 6) To Keep a Lid on Clubs on Steroids
- 7) To Keep Energized Rotarians
 - Off the Street
 - Out of Trouble
 - Out of Jail
 - From Feeling Uncommitted
 - From Being Committed
- 8) To Energize un-Energized Rotarians



Questions / Comments

Up next - Budget



Budget



- Total Budget is appx. \$300K. Covers 3 years 22-25
 - Sources of Income
 - RI - \$9K
 - Member dues - \$100K
 - Self Supporting Events - \$190K

Area	Budgeted Expenses
Major events (Foundation / Conference / Assembly / etc..) These are pass-thru.	\$140K
Administrative	\$ 40K
Committees	\$ 11K
Training (PETS / Governor / etc..)	\$ 67K
RI/Travel/Zone/Gifts/Misc.	\$43K



Budget



DISTRICT DUES WILL BE INCREASING

- \$10 increase
- \$60 / Member
 - Effective July 1, 2024
 - Last increase was 2008-9 - 16 years ago
 - 42% inflation factor



Budget - DUES TIMELINE



- Today – We Share the Increase
- Jan. 24, 2024 – Budget Training, PE Zoom Session
- March 23, 2024 – Budget Review and Approval – Assembly
- July 1, 2024 – Dues Increase Begins



Questions / Comments

Up next – The Rotary Foundation



The Rotary Foundation



- A little History
- Grants – How the Money Flows (Rotary Bucks!)
- The Timeline for President-elects (and the Why Behind the Timeline)



The Rotary Foundation - History



**The Rotary Foundation (TRF) was
started after 1917 Atlanta
Convention Surplus of \$26.50
By Arch Klumph,
RI President for the purpose of
“Doing Good in the World”**





The Rotary Foundation Today



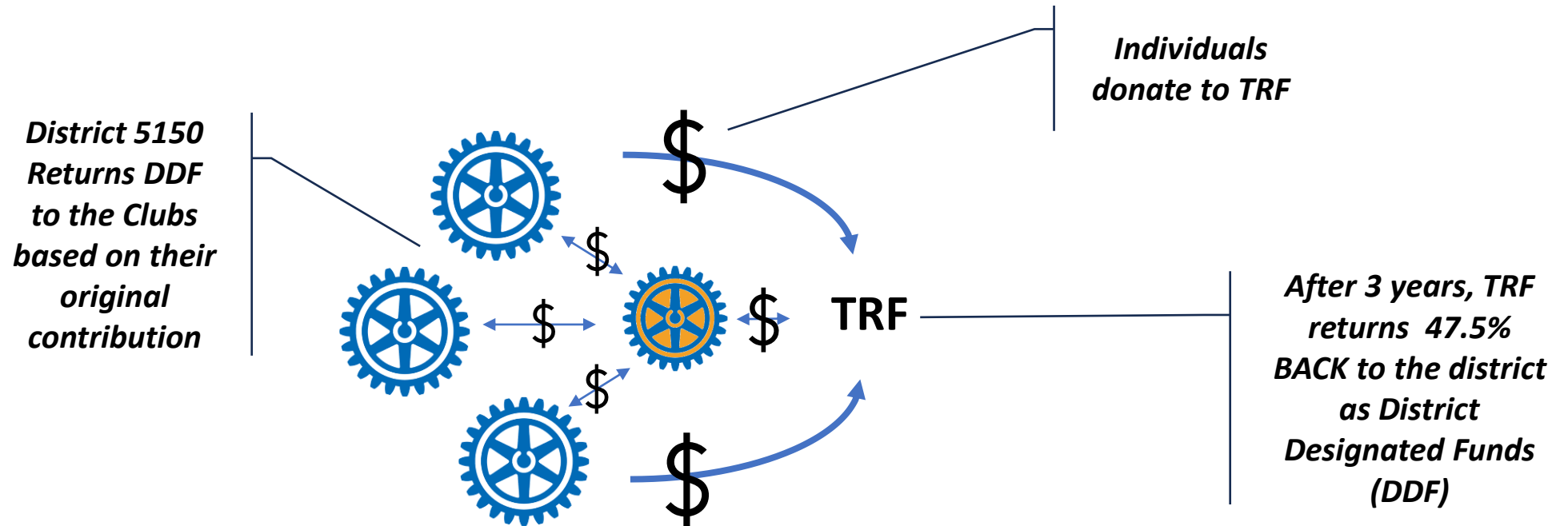
- Over \$5.7 Billion inception to date
- 91% of funds spent of program awards and operations
- 4 Star rating from Charity Navigator (Highest level possible) 14 Straight Years
- Funded by contributions to:
 - Annual Fund-Share*
 - Endowment**
 - PolioPlus
 - Disaster Response Funds

**** Donations to the Annual Fund-Share return to the clubs after 3 years as District Designated Funds (DDF)***

***** Earnings from Endowment donations return to the clubs after 3 years as District Designated Funds (DDF)***



The Rotary Foundation – Fun Fact



Out of 528 Districts in Rotary International, our District is the only district in the world that returns District Designated Funds to the Clubs



The Rotary Foundation - DDF



Clubs can spend their



on:

District Grants – Easy but no match

Global Grants – Harder but matching DDF



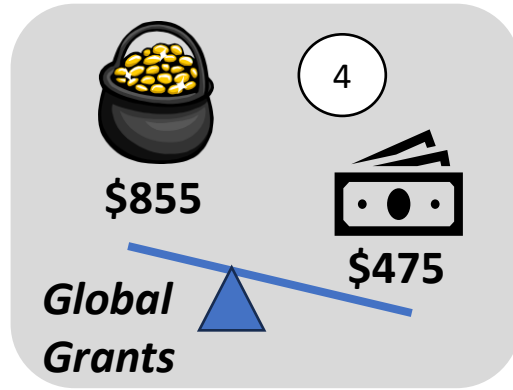
The Rotary Foundation – “Rotary Bucks”



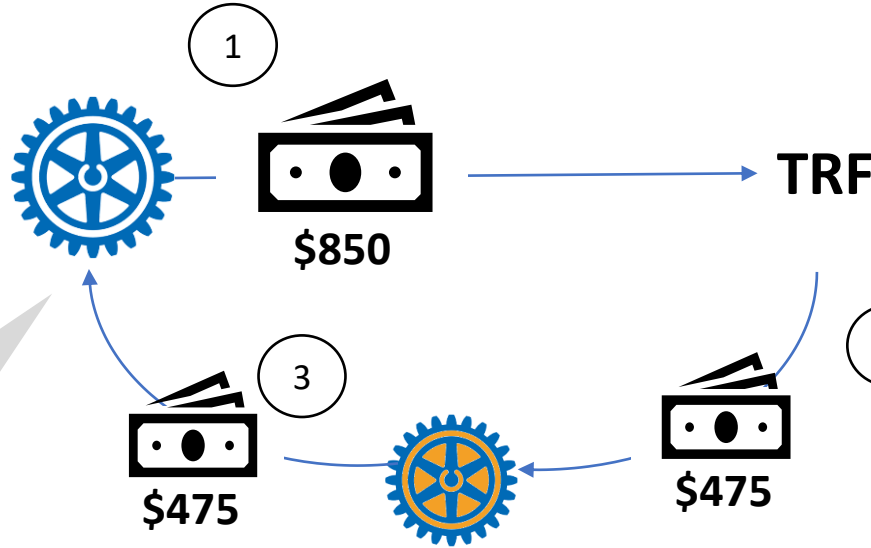
4) The club can leverage the \$475 to \$855 using RI grants

OR

The Club can use \$475 towards District Grants



OR



1) In 2021/2022 a club donates \$850 to TRF With earnings, \$1000

2) In 2024/2025 TRF return 47.5% (\$475) to District 5150

3) District 5150 sends the \$475 to back to the club

Grants Management Training is required
Transparency is KEY
There are timing considerations



What happens to the other \$475?



The other \$475 stays with World Fund

WORLD FUND PAYS FOR:

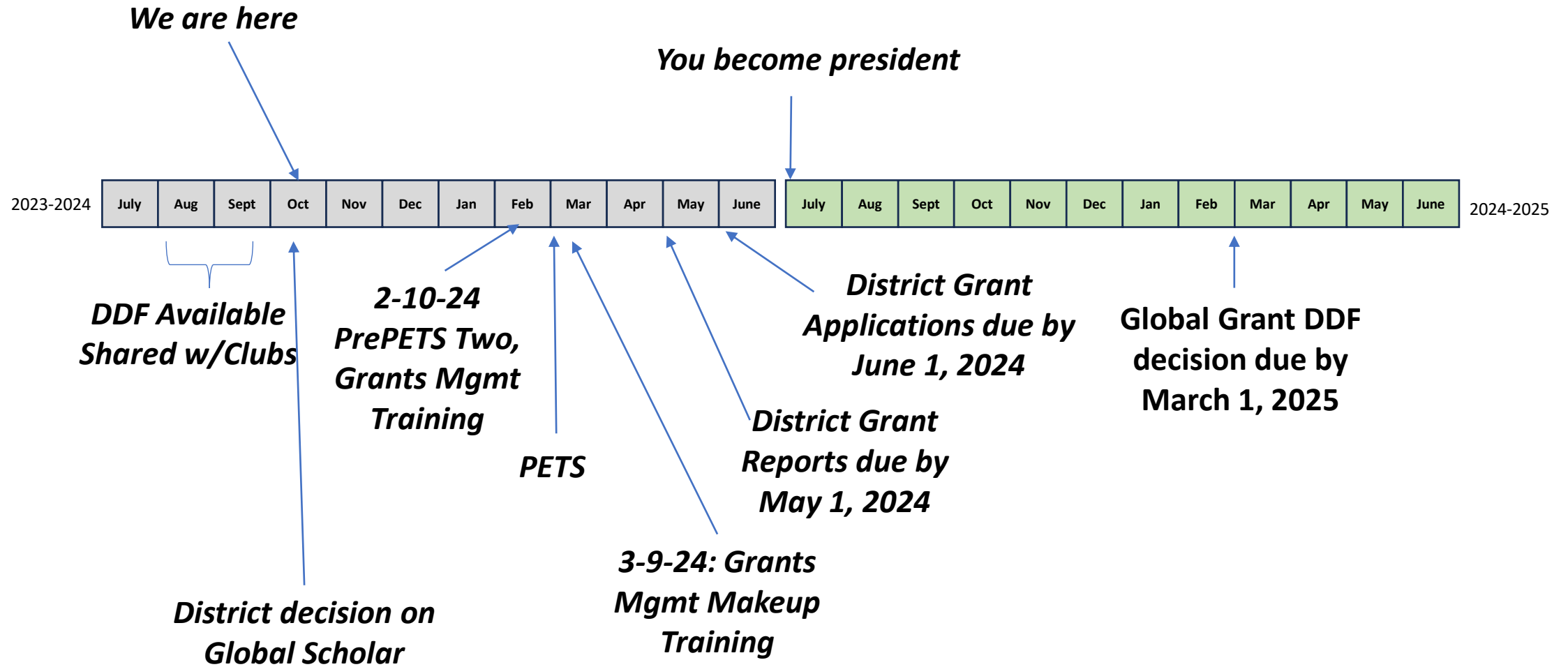
Peace Centers/Peace Fellows

Programs of Scale Grants

80% Global Grants match



The Rotary Foundation - Timing





Questions / Comments

Up next – Global Scholar



Global Scholar



Graduate study in foreign country

- Study must be in 7 Areas of Focus
- Global Grant – needs two districts
- Selection is Spring 2024
- Semester begins Aug/Sept 2024





Global Scholar Vote



Amount involved for District - \$17,500

- Matched by TRF/World Fund @ 80%
- Total Global Scholarship worth \$31,500
- Funded using Endowment Fund earnings

Vote is an advisory

Preference is that we have applicant from our District (Not required)



Global Scholar



Questions?

Let's vote



Up next:

- Surplus Unallocated DDF
- Hands On Awards
- Resources
- Calendar



DDF \$131k Unallocated Funds



Use It or Lose It By 2025-2026

Due to Unused DDF from Past

One Time Pot of Funds - \$131,000

Use Only for Global Grants

March 2, 2024



Hands On Awards



- Why are we doing this?
- How does it work?
- 2-5 Goals, self-selected
- What if I don't want to do this?



Resources



- <https://rotary5150.org/page/president-elect-resources-24-25>

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Member Login

Search

Home About Rotary ▾ About the District ▾ For Rotarians ▾ Calendar ▾ Contact Us ▾ **Donate**

Prepare for a successful term as President in 2024-2025!

Welcome, Presidents Elect! You have the best job in Rotary! As president, you lead and motivate your club, ensuring that members feel valuable, inspired, and connected to each other.

As president elect, you have the opportunity to build your plan, meet and network with a wide variety of people to help you prepare for your leadership term. It will be a time of preparation, leadership growth, and FUN!

This webpage is your online binder or "one stop" for resources to assist you with your preparation.

[REGISTER HERE FOR PRE-PETS 1. SATURDAY, OCT. 14 2:00PM AT SHARP PARK GOLF COURSE](#)

Page Overview

- [How to Prepare](#)
- [Key Dates](#)
- [Rotary Learning Center](#)
- [Resources & Reference](#)
- [Grant Qualification](#)
- [Tools](#)
- [Support Team](#)
- [Frequently Asked Questions](#)



Calendar



• October 14, 2023:	Pre-PETS One	Sharp Park Golf Course	2-5 PM
• October 21, 2023:	The Hunt to End Polio	See District Calendar	
• November 18, 2023:	Yippee ki yay for EREY	Long Branch Half Moon Bay	4-10 PM
• January 24, 2024:	PE Training Session	Zoom	6:30 PM
• February 10, 2024:	Pre-PETS Two & Grants Training	Rotary Terrace	9AM - 4PM
• March 1-3, 2024:	PETS - MANDATORY - San Jose DoubleTree	11AM Fri - 1PM Sunday	
• March 9, 2024:	Grants Training Makeup	Rotary Terrace	9-12 AM
• March 23, 2024:	Assembly/Project Fair	Redwood High School	8AM - 4:30 PM (times tent)
• April 10, 2024:	PE Training Session	Zoom	6:30 PM
• May 8, 2024:	PE Training Session	Zoom	6:30 PM
• May 17-19, 2024:	"Better Together" District Conference	Reno	
• May 25-29, 2024:	Rotary International Conference	Singapore	
• June 12, 2024:	PE Catch-up/Catch-all	Zoom	6:30 PM
• June 30, 2024:	SF Pride Parade	SF - Details to come	
• July 1, 2024:	CONGRATULATIONS PRESIDENTS!!!!		
• July 22, 2024:	Quarterly Presidents Meeting	Zoom -	6:00PM
• Aug. 10, 2024:	Presidents & PE BBQ	San Pedro Valley Park, Pacifica	11AM - 2PM TENTATIVE
• Aug 14-22, 2024:	Foundation Cruise	Gary Chow for Details	
• Oct. 12, 2024:	Foundation Event (Confidential)	TBD	11-5 PM
• Oct. 23, 2024:	Quarterly Presidents Meeting	Zoom -	6:00PM
• Oct. 24, 2024:	World Polio Day	Clubs determine	
• Jan. 22, 2025:	Quarterly Presidents Meeting	Zoom -	6:00PM
• Jan. 24-26, 2025:	World Peace Conference	Rohnert Park W/All PETS Districts	
• Apr. 23, 2025:	Quarterly Presidents Meeting	Zoom -	6:00PM
• Apr. 27, 2025	Major Donor (tentative)		
• May 15-18, 2025:	District Conference (Confidential)	Thursday thru Sunday	
• June 21-25, 2025:	RI Convention	Calgary, Canada	



ADJOURNMENT



**The Bar is Still Open
For Those That Require
Medicinal Assistance**