



DISTRICT ASSEMBLY TRAINING

DISTRICT 5930 June 6. 2020



CLUB ADMINISTRATION

CLUB SECRETARY, TREASURER

People of Action – Using Club Runner & Club Central

LEARNING MY ROTARY CLUB

Administrative/Secretary Duties

Learning Rotary international Website – My Rotary

www.rotary.org

After you sign on and get password to Rotary International website – My Rotary, you can access online learning courses for Club Administration.

Club Secretary Basics:

Sign in My Rotary

- Click Learning & References
- Click Learn by Role
- Click Club Roles
- Click Secretary
- Click on How to Prepare
- Click on Learning Center (in blue)

You are now in the Learning Center and it should show courses for Club Secretary Basics. They are short and here are some suggested topics you should watch:

- Get Ready Club Secretary
- Club Administration: Club Secretary
- My Rotary Club Administration
- Working with your Club Leaders
- Using a Club Management System
- Managing Club Finances
- Rotary Club Central Resources

R.I. Club District Support (CDS)

Nick Taylor, Associate Officer nick.taylor@rotary.org Ph: 847-866-3429

James Damato, Senior Supervisor James.damato@rotary.org ph: 847-866-3405

CLUB RUNNER

District & Club Websites

Club Runner website – Guides and Assistance

Sign in to ClubRunner – either your club website or you can use the District website – www.rotary5930.org. Your previous President or Secretary should be able to give you access to ClubRunner. You can also contact Nancy Paulson or Nancy Ross to give you access.

On upper right, click on “Member Area”.
Under “Admin”, click on “Help Guides”

There are several informational guides. I suggest you arrow down to “Club Administrative Guide”. You will be able to research how to do any of the administrative activities on the Club Runner website.

If you have questions about the ClubRunner site, you can contact their support and send an email question.

District ClubRunner Support:

Nancy Paulson, Web Master
Nancy@rockportwebsites.com
Cell: 361-462-8791

Nancy Ross, LTG Club Administration
Ross5357@aol.com
Home: 361-992-2706
Cell: 361-726-8122

ADMINISTRATIVE CHECKLIST FOR ROTARY CLUB DISTRICT 5930

6

<u>Due Date</u>	<u>Administrative Task</u>
Now/Jan 1 st	Dues of \$44 per member to District for Rotary year. Dues of \$34.50 to RI per Member on July 1st and January 1st. In addition, magazine subscription cost to RI of \$6 per member.
Monthly	Do Club Newsletter/Bulletin . Can do more often, but keep members Informed of club activities.
Monthly	Enter Membership/Attendance to Club Runner.
Ongoing	Update CR/RI for Members Info on email, phone, addresses, birthday.
Ongoing	Update your Club Constitution/Bylaws .
10th Monthly	Membership: Send Ignite report to Luis Cavazos (Lrcavazos@aol.com)
June 30, 2020	Club Goals input to RI Club Central at rotary.org. Sign into My Rotary. These Goals should be updated at least quarterly. Presidential Citation comes from the data you input on these goals.
Jun 30, 2020	Deadline District Awards activities completed.
Jun 30, 2020	Rotary Citation 2019-2020 for Rotary Club Awards are due. Make sure Goals are completed on My Rotary – Club Central at RI
July 1, 2020	Submit forms for District Exemplary & Rooted in Service
Nov 16, 2020	Club Tax Exempt Tax Return filed with IRS. File either 990, 990N, 990EZ, 990T. Send email to ross5357@aol.com once return filed as District needs confirmation that club is in compliance with tax filing requirements to keep your tax exempt status and a requirement for Club Awards and Grants.
Feb 1, 2021	Input New Officers for 2021-2022 to Club Runner and RI. At a minimum, You need President, Secretary and Treasurer entered.
February 2021	Send President-Elect to PETS . In Dallas.

Attend District Events and encourage Club members to participate.

June 27, 2020	District Governor Bartnesky Installation via Zoom
July 18, 2020	Rotary Leadership Institute part 2 & 3 - Kingsville
July 31, 2020	Multi-District Training Institute via Zoom
Sept 08, 2020	Zones 25B & 29 Institute via Zoom
Oct 24, 2020	World Polio Day
Oct 30, 2020.	A Night at Aquarium – District Conference Event
January 2021	RYLA
4-29 to 5-2, 2021	District Conference, Harlingen Conference Center

If you have questions or concerns on Club Administration contact:

LTG Club Administration Nancy Ross, ross5357@aol.com, 361-726-8122

ADMINISTRATIVE CHECKLIST FOR ROTARY CLUB – END OF YEAR

DISTRICT 5930

7

It is the end of another successful District 5930 Rotary year. Here are some things your club need to be doing between now and June 30, 2020.

— Membership: Cleanup Club Central. Delete members that are no longer in the club and add any new members. Complete ideally by end of May or mid-June. Note that whoever you have listed on July 1st is how many you will be billed dues. Also, be sure to update members information if there has been changes.

— Ignite: Update your data on the Ignite program and send to Luis Cavazos to show your accomplishments this year.

— R.I. Goals: Go into My Rotary at rotary.org and input updates on your goals and service projects. If you were unable to complete a service project, delete it from the goals. You have to complete the goals by June 30th in order for your club to get recognition for accomplishments this last year.

— Goals for 2020-2021: Incoming Club Presidents should I put their Goals into My Rotary by June 30th. A budget should be drafted and presented to your Board at your first Board meeting in the new Rotary year.

— Club Officers for 2020-2021: All of your officers for next year should already be input to Club Runner. But, unfortunately, we have 24 clubs that have not completed this requirement. I will send an individual email to the Presidents/PE of each club to remind them and advise that we will have to roll over the officers if they fail to elect new ones. RI requires a minimum of President, PresidentElect, Secretary and Treasurer to be notated in order to be a Rotary Club.

— District Grants: Grants your club received for 2019-2020 should have the final information input to Club Runner and closed by May 31, 2020. Requests for grants for 2020-2021 should be submitted by June 30, 2020.

— District 2019-2020 Awards: Because of the Pandemic issues, the District Exemplary and Rooted in Service Awards date has been extended to June 30, 2020 for completion. A form for each award will be posted on the District website by June 1, 2020. Submission will be July 1.

District Assembly: The yearly assembly will be done virtually this year. We are in the planning stages, so watch for further information on this training. To stay engaged with Rotary please sign up and attend the Zoom meetings for District Conference. The next one is scheduled this Saturday (May 9th) at 8:30 am. You have to register to get the access information and the session is free. Go into Rotary5930.org website to register.

— Meeting Plans for 2020-2021:

- DG Bartnesky installation will be done virtually. More information to follow.
- DG club visits will be held virtually for calendar year 2020 unless something changes and it will be re-evaluated.
- District will not host any in-person meetings/events for calendar year 2020 unless somethings changes and it will be re-evaluated.
- No in-person club meeting or events shall be mandatory for any Rotarian participant who may feel uncomfortable attending because of the Pandemic.
- Clubs are free to decide if they should meet in-person or virtually and are encouraged to follow local health and government regulations.

If you need help in working the virtual meetings, the District has several individuals willing to assist you. You can contact your Assistant Governor or the District Webmaster to help you find an assistant. I am available if you have any questions about this guide.

Nancy Ross
LTG Club Administration
Ross5357@aol.com
361-726-8122

CLUB FINANCES

www.rotary.org

Club Finances – Treasurer

After you sign on and get password to Rotary International website – My Rotary, you can access online learning courses for Club Administration.

Club Treasurer Basics:

Sign in **My Rotary**

Click *Learning & References*

Under *Learn by Role / Club Roles*, Click *Treasurer*

1. Review “What you do” for most important duties of Treasurer
2. BEFORE June 30, 2020, click on “Pay or view your club invoice” to review list of members for RI dues, payment due 7/1/2020. To edit member roster, visit with Club Secretary to update members in ClubRunner or directly with RI.
3. BEFORE June 30, 2020, work with your club President to develop a club budget. Under *Resources & reference*, see link to *Budget Worksheet* for a template.
4. Under *How to Prepare*, Click on *Learning Center* (in blue)

You are now in the Learning Center. Type “treasurer” in the search box, and enter. You should find the “Club Treasurer Basics” learning course.

These are short and here are some suggested topics you should watch:

Get Ready Club Secretary
 Club Administration: Club Secretary
 My Rotary Club Administration
 Working with your Club Leaders
 Using a Club Management System
 Managing Club Finances
 Rotary Club Central Resources

DG BARTNESKY CLUB VISIT CALENDAR

SUBJECT TO CHANGE

JULY 2020

13 th - 6 p.m.	North Harlingen Board
14 th - 6 p.m.	Willacy Board
15 th - 6 p.m.	Harlingen Sunburst Board
16 th - 6 p.m.	Harlingen Board
17 th - 12 p.m.	Area 8 Zoom Meeting
20 th - 6 p.m.	Goliad Board
21 st - 6 p.m.	Genado Board
22 nd - 6 p.m.	Edna Board
23 rd - 12 p.m.	Area 1 Zoom Meeting
23 rd - 6 p.m.	Port Lavaca Board
27 th - 6 p.m.	Downtown Victoria Board
28 th - 12 p.m.	Area 2 Zoom Meeting
28 th - 6 p.m.	Victoria Board
30 th - 6 p.m.	North Victoria Board

DG BARTNESKY CLUB VISIT CALENDAR

SUBJECT TO CHANGE

AUGUST 2020

3 rd – 6 p.m.	Aransas Pass Board
4 th – 6 p.m.	Ingleside Board
5 th – 6 p.m.	Rockport Board
6 th – 12 p.m.	Area 3 Zoom Meeting
6 th – 6 p.m.	Port Aransas Board
10 th – 6 p.m.	Sinton Board
11 th – 6 p.m.	Portland Board
12 th – 12 p.m.	Area 4 Zoom Meeting
12 th – 6 p.m.	Corpus Christi NW board
13 th – 6 p.m.	Corpus Christi Sunrise Board
17 th – 6 p.m.	West Corpus Christi Board
18 th – 6 p.m.	Southside Corpus Christi Board
19 th – 6 p.m.	Corpus Christi evening Board
20 th – 12 p.m.	Area 5 Zoom Meeting
20 th – 6 p.m.	Corpus Christi Board
25 th – 6 p.m.	San Diego Board
26 th – 12 p.m.	Area 6 Zoom Meeting
26 th – 6 p.m.	Alice Board
27 th – 6 p.m.	Freer Board
28 th – 6 p.m.	Three Rivers Board

DG BARTNESKY CLUB VISIT CALENDAR

SUBJECT TO CHANGE

SEPTEMBER 2020

1 st – 12 p.m.	Area 7 Zoom Meeting
1 st – 6 p.m.	Kingsville Board
2 nd – 6 p.m.	Weslaco Board
3 rd – 6 p.m.	Kingsville Sunrise Board
14 th – 6 p.m.	North Brownsville Board
15 th – 6 p.m.	Historic Brownsville Board
16 th – 12 p.m.	Area 9 Zoom Meeting
16 th – 6 p.m.	Brownsville Board
17 th – 6 p.m.	Brownsville Sunrise Board
21 st – 6 p.m.	Pharr Board
22 nd – 6 p.m.	Donna Board
23 rd – 6 p.m.	Edcouch Elsa Board
24 th – 12 p.m.	Area 10 Zoom Meeting
24 th – 6 p.m.	Edinburg Board
28 th – 6 p.m.	Mission Board
29 th – 6 p.m.	McAllen Board
30 th – 12 p.m.	Area 11 Zoom Meeting
30 th – 6 p.m.	McAllen Evening Board

DG BARTNESKY CLUB VISIT CALENDAR

SUBJECT TO CHANGE

OCTOBER 2020

1 st – 6 p.m.	Rio Grande City Board
2 nd – 6 p.m.	McAllen South Board
19 th – 6 p.m.	Laredo Under 7 Board
20 th – 6 p.m.	Laredo Board
21 st – 12 p.m.	Area 12 Zoom Meeting
21 st – 6 p.m.	Laredo Next Generation Board
22 nd – 6 p.m.	Laredo Gateway Board
23 rd – 6 p.m.	Laredo Daybreak Board

NOVEMBER 2020

2 nd – 6 p.m.	Rancho Vijeo Board
3 rd – 6 p.m.	Los Fresnos Board
4 th – 6 p.m.	San Benito Board
5 th – 6 p.m.	Port Isabel Board
6 th – 12 p.m.	Area 13 Zoom Meeting

DG VISIT CHECKLIST

2020-2021



ROTARY INTERNATIONAL Rotary Citation 2020-21 Goals

Goal	Description	Category	System Generated or Self-reported
1 Club membership	How many total members does your club want by the end of the Rotary year?	Members and Engagement	System generated
2 Service participation	How many members will participate in club service activities during the Rotary year?	Members and Engagement	Self-reported
3 New member sponsorship	How many members will sponsor a new club member during the Rotary year?	Members and Engagement	Self-reported
4 Rotary Action Group participation	How many club members will be members of at least one Rotarian Action Group (RAG) during the Rotary year?	Members and Engagement	Self-reported
5 Leadership development participation	How many members will participate in leadership development programs or activities during the Rotary year?	Members and Engagement	Self-reported
6 District conference attendance	How many members will attend your district conference?	Members and Engagement	Self-reported
7 Rotary Fellowship participation	How many club members will be members of a Rotary Fellowship during the Rotary year?	Members and Engagement	Self-reported
8 District training participation	How many of your club's committee chairs will attend the district training assembly?	Members and Engagement	Self-reported
9 Annual Fund contributions	How much money will be contributed to The Rotary Foundation Annual Fund by your club and its members during the Rotary year? You can select your local Rotary currency for setting your goal and viewing progress.	Rotary Foundation Giving	System generated
10 PolioPlus Fund contributions	How much money will be contributed to The Rotary Foundation PolioPlus Fund by your club and its members during the Rotary year? You can select your local Rotary currency for setting your goal and viewing progress.	Rotary Foundation Giving	System generated

RI CITATION

2020-2021 Goals

RI CITATION

2020-2021 Goals



ROTARY INTERNATIONAL Rotary Citation 2020-21 Goals

Goal	Description	Category	System Generated or Self-reported
11 Major gifts	How many single outright donations of US\$10,000 or more will be made by individuals associated with your club during the Rotary year?	Rotary Foundation Giving	System generated
12 Bequest Society members	During the Rotary year, how many individuals or couples will inform The Rotary Foundation of their plans to leave US \$10,000 or more to The Rotary Foundation through their estate?	Rotary Foundation Giving	System generated
13 Benefactors	During the Rotary year, how many individuals or couples will inform The Rotary Foundation of their estate plans to include the Endowment Fund as a beneficiary or will make an outright gift of US\$1,000 or more to the Endowment Fund?	Rotary Foundation Giving	System generated
14 Service projects	How many service projects will your club complete during the Rotary year? To track and report project details, such as contributions and volunteer hours, select Service Activities in the main menu.	Service	System generated
15 Rotaract clubs	How many new and existing Rotaract clubs will your club sponsor during the Rotary year?	Young Leaders	System generated
16 Interact clubs	How many new and existing Interact clubs will your club sponsor during the Rotary year?	Young Leaders	System generated
17 Inbound Youth Exchange students	How many Rotary Youth Exchange students will your club host during the Rotary year?	Young Leaders	Self-reported
18 Outbound Youth Exchange students	How many Rotary Youth Exchange students will your club sponsor during the Rotary year?	Young Leaders	Self-reported
19 RYLA participation	How many individuals will your club sponsor to participate in Rotary Youth Leadership Awards (RYLA) events during the Rotary year?	Young Leaders	Self-reported
20 Strategic plan	Does your club have an up-to-date strategic plan?	Public Image	Self-reported
21 Online presence	Does your club's online presence accurately reflect its current activities?	Public Image	Self-reported
22 Social activities	How many social activities will your club hold outside of regular meetings during the Rotary year?	Public Image	Self-reported

RI CITATION

2020-2021 Goals



ROTARY INTERNATIONAL Rotary Citation 2020-21 Goals

Page 3 of 3

	Goal	Description	Category	System Generated or Self-reported
23	Update website and social media	During the Rotary year, how many times per month will your club's website or social media accounts be updated?	Public Image	Self-reported
24	Media stories about club projects	How many media stories will cover your club's projects during the Rotary year?	Public Image	Self-reported
25	Use of official Rotary promotional materials	Did your club use Rotary International's advertising and public service materials, such as broadcast videos, print ads, and other official materials available in the Brand Center, to promote Rotary in your community during the Rotary year?	Public Image	Self-reported

EXEMPLARY CLUB RECOGNITION

2020-2021 Goals

Rotary District 5930 2020-2021 Exemplary Club Recognition Award

Qualification Requirements:

- 1) Club is in good standing with IRS
- 2) Rotary International confirms the Rotary Club qualifies for the RI 2020-2021 Rotary Citation.
- 3) Club Officers for the upcoming Rotary year (2020-2021) are reported to Club and District websites & My Rotary (data@rotary.org) no later than the end of June 2020.
- 4) Club Officers for the upcoming Rotary year (2021-2022) are reported to Club and District websites & My Rotary (data@rotary.org) no later than the end of January 01, 2021.

Successfully Complete any 9 of the 12 requirements described below:

- 1) Your Club will host at least one Strategic Planning meeting each year at which you ask: "What should our club be like in 5 years and what steps should we take to achieve this?"
- 2) Qualify as an Ignite Premier Club in the **District 5930 2020-2021 IGNITE** program or implement and document some membership recruitment & retention program.
- 3) Start a new Rotary Club or Rotaract Club following the Rotary Club Models worksheet.
- 4) Participate as a sponsor, associate sponsor or contributor in a Rotary project providing service in one of Rotary International's "Six Areas of Focus" in another country (minimum financial participation should be equivalent to \$10 per club member).
- 5) Participate in at least 4 of the following District 5930 **Youth Services Programs** by sponsoring or co-sponsoring a:
 - a) Four Way Test Speech Contest participant
 - b) RYLA Participant
 - c) Early Act First Knight/Early Act
 - d) Rotaract Club
 - e) Interact Club
 - f) Youth Exchange participant
 - g) Adoption Awareness Picnic
 - h) Global Grant Scholar
 - i) District Grant Costa Rica or Veteran's Scholar
- 6) **Club President Elect** attended **Lone Star PETS 2020** or a **PETS Alliance Multi-District PETS**.

EXEMPLARY CLUB RECOGNITION

2020-2021 Goals

- 7) At least 15% (10 members max) of club members attend 2020 District Assembly to train Club leadership and introduce interested Rotarians to the RI Strategic Plan including Becoming and Maintaining a Vibrant Club, Rotary Leadership development, Club Administration, importance of our Rotary's Public Image and the Rotary Brand, Supporting our Rotary Foundation and how it will support your Club Service projects, to be held on Saturday, May 16, 2020 at Texas A & M Kingsville.
- 8) At least 15% (10 members max) of club members attend the Rotary District 4:1 – Exciting Rotary Leadership Institute training (RLI), Enhancing Rotary's Public Image in your community, Membership Matters and Your Rotary Foundation in Action to be held on October 03, 2020.
- 9) At least 15% (10 members max) of club members attend your 2021 District Conference for Rotarians, Family and Youth on April 30 to May 02, 2021 at the Harlingen Convention Center.
- 10) At least 15% of Club Membership (as of May 31, 2021) is registered (login & password) on My Rotary (Club Central) (www.rotary.org) and Club Runner (www.rotary5930.org).
- 11) Participate in a Polio Day event
- 12) Participate in a Rotary Peace event

Exemplary Clubs will receive a certificate and trophy, with special recognition given at a District Event in the Fall of 2021, as well as other recognition on the District Website and Facebook page.

NOTE: Deadline for completion of the Exemplary Club checklist, found on the District website, is June 30, 2021.

LEND A HELPING HAND RECOGNITION AWARD

2020-2021 Goals

Rotary District 5930

2020-2021

Lend A Helping Hand

Recognition Award

Qualification Requirements:

- 1) Club is in good standing with IRS
- 2) Club officers for the upcoming Rotary year (2020-2021) are reported to Club and District websites & My Rotary (data@rotary.org) no later than the end of June 2020.
- 3) Club officers for the upcoming Rotary year (2021-2022) are reported to Club and District websites & My Rotary (data@rotary.org) no later than the end of February 1, 2021.

Successfully complete 6 of the 9 requirements described below:

- 1) Implement and document a membership recruitment & retention program.
- 2) Participate as a sponsor, associate sponsor or contributor in a Rotary project providing service in one of Rotary International's "Six Areas of Focus" in another country (minimum financial participation should be equivalent to \$5 per club member).
- 3) Participate in at least 3 of the following District 5930 **Youth Services Programs** by sponsoring or co-sponsoring a:
 - a) Four Way Test Speech Contest participant
 - b) RYLA Participant
 - c) Early Act First Knight/Early Act
 - d) Rotaract Club
 - e) Interact Club
 - f) Youth Exchange participant
 - g) Adoption Awareness Picnic
 - h) Global Grant Scholar
 - i) District Grant Costa Rica or Veteran's Scholar
- 4) **Club President Elect** attended **Lone Star PETS 2020** or a **PETS Alliance Multi-District PETS**.
- 5) At least 5% (6 members max) of club members attend 2020 District Assembly to train Club leadership and introduce interested Rotarians to the RI Strategic Plan including Becoming and Maintaining a Vibrant Club, Rotary Leadership development, Club Administration, importance of our Rotary's Public Image and the Rotary Brand,

LEND A HELPING HAND RECOGNITION AWARD

2020-2021 Goals

Supporting our Rotary Foundation and how it will support your Club Service projects, to be held on Saturday, May 16, 2020 at Texas A & M Kingsville.

- 6) At least 5% (6 members max) of club members attend the Rotary District 4:1 – Exciting Rotary Leadership Institute training (RLI), Enhancing Rotary's Public Image in your community, Membership Matters and Your Rotary Foundation in Action to be held on October 03, 2020.
- 7) At least 5% (6 members max) of club members attend your 2021 District Conference for Rotarians, Family and Youth on April 30 to May 02, 2021 at the Harlingen Convention Center.
- 8) At least 5% of Club Membership (as of May 31, 2021) is registered (login & password) on My Rotary (Club Central) (www.rotary.org) and Club Runner (www.rotary5930.org).
- 9) Participate in a Polio Day event or Peace Event.

Lend A Helping Hand clubs will receive a certificate and will receive special recognition at the District Conference in May 2021 as well as other recognition on the District website and Facebook page.

NOTE: Deadline for completion of the Lend A Helping Hand Club application, found on the District website and app, is May 1, 2021.



QUESTIONS