



# **DISTRICT ASSEMBLY TRAINING**

**DISTRICT 5930 May 22, 2021**



# CLUB ADMINISTRATION

## CLUB SECRETARY, TREASURER

# People of Action – Using Club Runner & Club Central

# LEARNING MY ROTARY CLUB

## Administrative/Secretary Duties

[www.rotary.org](http://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](mailto:nick.taylor@rotary.org) Ph: 847-866-3429

James Damato, Senior Supervisor [James.damato@rotary.org](mailto:James.damato@rotary.org) ph: 847-866-3405

# CLUB RUNNER

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## 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](http://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](mailto:Nancy@rockportwebsites.com)  
Cell: 361-462-8791

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

# Club Runner for Clubs to access

Changes to Club membership need to be input to Club Runner. It will flow up to RI as long as your club is synched with RI. Information input to My Rotary at RI does not flow down to Club Runner, so you still have to enter them into Club Runner. 6

If your club does not pay for a Club Runner website, you will use the District website at [www.Rotary5930.org](http://www.Rotary5930.org). Click on “Member Access” from main page. At top click on “For Clubs” and then you will be able to enter any changes to membership and your club officers.

If needed, I can give you the logon and temporary password to get access.

# ADMINISTRATIVE CHECKLIST FOR ROTARY CLUB DISTRICT 5930

## Administrative Checklist for Rotary Club

### District 5930

#### Due Date

#### Administrative Task

Now/Jan 1<sup>st</sup>

**Dues** of \$44 per member to District for Rotary year. Dues of \$35 plus \$1 for Council of Legislation to RI per Member on July 1<sup>st</sup> and \$35 on January 1<sup>st</sup>. 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. Post club events to District Calendar. If you are synced with R.I., your data input to Club Runner will update to RI database.

Ongoing

Update your Club **Constitution/Bylaws**.

# ADMINISTRATIVE CHECKLIST FOR ROTARY CLUB DISTRICT 5930

|               |  |              |   |
|---------------|--|--------------|---|
| 10th Monthly  | Membership: Send <b>Ignite</b> report to Helen Peters<br>( <a href="mailto:Helenthetailor.peters@gmail.com">Helenthetailor.peters@gmail.com</a> ).   | Sept 7-12    | Zone Institute Training, Multi District in Houston.   |
| NOW           | Club <b>Goals</b> 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.   | Oct 24, 2021 | World Polio Day District Virtual Walk event.  |
|               |  | Nov 6, 2021  | District Leadership Training covering Foundation and Public Image at TAMU, Kingsville. Email about registration will be sent to clubs. Counts toward District Awards. |
| June 12-16    | Virtual RI Convention. Cost is \$65.   |              |   |
| June 30, 2021 | Deadline to submit Forms for District Awards; and submit request for District Grants for 2021-2022. If you are applying for the Most Impactful Project Award, you may get the Grant deadline extended. |              |   |



# ADMINISTRATIVE CHECKLIST FOR ROTARY CLUB DISTRICT 5930

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Nov 15, 2021 Club **Tax Exempt Tax Return** filed with IRS. File either 990, 990N, 990EZ, 990T.  
Send email to [ross5357@aol.com](mailto: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.

Dec 31, 2021 Must complete electing all Club officers for 2022-2023.

Feb 1, 2022 Input **New Officers** for 2022-2023 to Club Runner and RI. At a minimum,  
You need President, President-Elect, Secretary and Treasurer entered.

February 2021 Send President-Elect to **PETS**. In Dallas

**If you have questions or concerns on Club Administration contact:**

LTG Club Administration Nancy Ross, [ross5357@aol.com](mailto:ross5357@aol.com), 361-726-8122

# ADMINISTRATIVE CHECKLIST FOR ROTARY CLUB – END OF YEAR

## DISTRICT 5930

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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, 2021.

*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 1<sup>st</sup> 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. (luis.cavazos@geffinancial.com)

*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 30<sup>th</sup> in order for your club to get recognition for accomplishments this last year.

*Goals for 2021-2022:* Incoming Club Presidents should input their Goals into My Rotary by June 27<sup>th</sup>. A budget should be drafted and presented to your Board at your first Board meeting in the new Rotary year.

*Club Officers for 2021-2022:* All of your officers for next year should already be input to Club Runner. But, unfortunately, we have 20 clubs that have not completed this requirement. I have sent an individual email to the Area AG's requesting they contact those clubs who still need to input their officers to Club Runner. As a reminder, we will have to roll over the officers if they fail to elect new ones. RI requires a minimum of President, President-Elect, Secretary and Treasurer to be notated in order to be a Rotary Club. Thank you to the following Area's for having all their clubs having completed this requirement: Area 6 – AG Maria Castillo; Area 7 – AG Charles Clements; and Area 11 – AG Lupita Zepeda.

*District Grants:* Grants your club received for 2020-2021 should have the final information input to Club Runner and closed by May 31, 2021. Requests for grants for 2021-2022 should be submitted by June 30, 2021.

*District 2020-2021 Awards:* You have until June 30, 2021 to complete all actions to qualify for District and RI Awards. A form for each award is posted on the District website. Submission will be June 30, 2021. Note – putting in timely Club Officers and goals are a requirement to receive awards.

# ADMINISTRATIVE CHECKLIST FOR ROTARY CLUB – END OF YEAR

*New RI Club Award:* District 5930 has a Most Impactful Project of the Year Award will recognize small, medium and large clubs that have successfully developed and implemented at least one significant project during 2020-2021. The project must have been funded in part by the Rotary Foundation. More information is available on District website. Nominations are due November 15, 2021.

*District Assembly:* The yearly assembly will be done virtually this year. Part 1 will be Saturday, May 15<sup>th</sup> from 9am to 12:30. It will cover Foundation and Grant Certification. Part 2 will be Saturday, May 22 from 9am to 12:45. It will cover Membership/Ignite; Rotary Leadership Institute; and Club Administration. All incoming Club officers should attend both sessions. All Rotarians are invited and encourage new members to attend to learn more about Rotary. There is no charge for this training. Zoom link to meeting will be sent to all Rotarians on Wednesday, May 19<sup>th</sup>.

## *Meeting Plans for 2021-2022:*

DG Chapa installation will be on June 26<sup>th</sup> at Echo Hotel in Edinburg. Go to the District website to register. More information to follow.

May 26 at 6 pm – Zoom District 5930 Membership Chair Presentation on How to Grow Your club. Facilitator will be Luis Cavazos. Email sent to Rotarians.

2021 RI Virtual Convention will be June 12-16. Registration is open and fee is \$65. District website has information and link to register.

November 6, 2021 will be the District Leadership Training (formerly 4 N 1 Training). It will be held at TAMU Kingsville.

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

## 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, 2021, click on “Pay or view your club invoice” to review list of members for RI dues, payment due 7/1/2021. To edit member roster, visit with Club Secretary to update members in ClubRunner or directly with RI.
3. BEFORE June 30, 2021, 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

# CLUB FINANCES

[www.rotary.org](http://www.rotary.org)

# DG CHAPA CLUB VISIT CALENDAR

SUBJECT TO CHANGE

| Club Meeting                 | Rotary Club Name  | Board Meeting |
|------------------------------|-------------------|---------------|
| Wednesday, August 4, 2021    | Goliad            | 08/03/21      |
| Monday, September 06, 2021   | Ganado            | 08/06/21      |
| Tuesday, September 10, 2021  | Edna              | 08/05/21      |
| Thursday, August 5, 2021     | Port Lavaca       | 08/04/21      |
| Tuesday, July 20, 2021       | Victoria Downtown | 08/07/21      |
| Wednesday, July 21, 2021     | Victoria          | 08/08/21      |
| Friday, July 23, 2021        | Victoria North    | 08/09/21      |
| Wednesday, September 1, 2021 | Aransas Pass      | 09/30/21      |
| Thursday, September 08, 2021 | Ingleside         | 09/07/21      |
| Thursday, September 09, 2021 | Port Aransas      | 09/08/21      |
| Friday, September 10, 2021   | Rockport          | 09/10/21      |
| Tuesday, August 03, 2021     | Portland          | 08/02/21      |
| Wednesday, August 04, 2021   | Sinton            | 08/03/21      |
| Wednesday, September 1, 2021 | CC Sunrise        | 08/31/21      |
| Thursday, September 2, 2021  | CC NW             | 09/01/21      |
| Thursday, July 22, 2021      | CC Evening        | 07/17/21      |
| Thursday, September 23, 2021 | Southside CC      | 09/22/21      |
| Friday, October 01, 2021     | Corpus Christi    | 09/30/21      |

# DG CHAPA CLUB VISIT CALENDAR

SUBJECT TO CHANGE

|                               |                      |          |
|-------------------------------|----------------------|----------|
| Thursday, October 07, 2021    | West CC.             | 10/06/21 |
| Wednesday, September 15, 2021 | San Diego            | 09/14/21 |
| Thursday, September 16, 2021  | Alice                | 09/15/21 |
| Friday, September 17, 2021    | Freer                | 09/16/21 |
| Wednesday, September 22, 2021 | Three Rivers         | 09/21/21 |
| Wednesday, September 01, 2021 | Kingsville           | 08/26/21 |
| Friday, September 03, 2021    | Kingsville Sunrise   | 09/02/21 |
| Friday, October 08, 2021      | Harlingen            | 10/07/21 |
| Tuesday, October 05, 2021     | North Harlingen      | 10/04/21 |
| Wednesday, October 06, 2021   | Willacy              | 10/05/21 |
| Thursday, October 07, 2021    | Harlingen Sunburst   | 10/06/21 |
| Tuesday, October 19, 2021     | Harlingen Satellite  | 10/18/21 |
| Tuesday, October 19, 2021     | Brownsville North    | 10/18/21 |
| Wednesday, October 20, 2021   | Brownsville noon     | 10/19/21 |
| Thursday, October 21, 2021    | Historic Brownsville | 10/20/21 |
| Friday, October 22, 2021      | Brownsville Sunrise  | 10/21/21 |
| Tuesday, December 7, 2021     | Donna                | 12/06/21 |
| Wednesday, December 8, 2021   | Edcouch              | 12/07/21 |
| Tuesday, December 21, 2021    | Pharr                | 12/20/21 |

# DG CHAPA CLUB VISIT CALENDAR

SUBJECT TO CHANGE

|                              |                        |            |
|------------------------------|------------------------|------------|
| Wednesday, December 1, 2021  | Weslaco                | 11/30/21   |
| Thursday, December 16, 2021  | Edinburg               | 12/15/21   |
| Wednesday, November 10, 2021 | McAllen                | 11/09/21   |
| Wednesday, November 3, 2021  | McAllen Evening        | 11/02/21   |
| Friday, November 5, 2021     | McAllen South          | 11/04/21   |
| Friday, November 19, 2021    | Rio Grande City        | 11/18/21   |
| Thursday, October 7, 2021    | Mission                | 10/06/21   |
| Friday, August 20, 2021      | Laredo Gateway         | 08/19/21   |
| Sunday, August 29, 2021      | Laredo Under Seven     | 08/27/21   |
| Wednesday, August 18, 2021   | Laredo                 | 08/17/21   |
| Thursday, August 12, 2021    | Laredo Next Generation | 08/11/21   |
| Friday, August 20, 2021      | Laredo Daybreak        | 08/19/21   |
| Friday, July 30, 2021        | San Benito             | 07/29/21   |
| Friday, August 27, 2021      | Port Isabel            | 08/26/21   |
| Friday, October 8, 2021      | Los Fresnos            | 10/07/2021 |
| Wednesday, November 10, 2021 | Rancho Viejo           | 11/09/21   |

# RI CITATION

## 2021-2022 Goals



### 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

## 2021-2022 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

## 2021-2022 Goals



### ROTARY INTERNATIONAL Rotary Citation 2020-21 Goals

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|    | 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 AWARD

## 2021-2022 Goals



To achieve this Award:

Review these goals with your Assistant Governor (AG).

Make an action plan to achieve these goals.

Have your Assistant Governor (AG) review your action plan.

Report your accomplished and completed action plan to the District Lt. Governor Administration.

Final Review will be conducted by the Leadership Team.

### **Qualification Requirements:**

Club is in good standing with IRS. (Lt. Governor of Administration)

Meet with your Assistant Governor (AG) once a month and complete your club action plan by August 1, 2021.

Each club should enter their officer's information as follows:

Rotary year (2021-2022) reported in club runner and district website ([www.rotary5930.org](http://www.rotary5930.org)) & my rotary ([www.rotary.org](http://www.rotary.org)) by June 30, 2021.

Each club should enter their club officer's information as follows:

Rotary year (2022-2023) club runner and district website ([www.rotary5930.org](http://www.rotary5930.org)) & my rotary ([www.rotary.org](http://www.rotary.org)) by January 31, 2022.

### **Successfully Complete any 9 of the 12 requirements described below:**

1. Club President-Elect Attended Lone Star PETS 2021.
2. Give to the Rotary Foundation (TRF) Annual Fund in the amount of \$500.00 Dollars or more.
3. Each Club's Foundation Chairperson will need to contact The District Foundation Chairperson or Co-Chair by September 1, 2021, to review their Foundation Action Plan.
4. Each Club's Membership Chairperson will need to contact the District Lt. Governor Membership and Qualify your club as an Ignite Premier Club in the District 5930 2021-2022 IGNITE Program.

# EXEMPLARY CLUB RECOGNITION

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## 2021-2022 Goals



5. Submit at least one article for publication in the District newsletter that showcases your club's project(s).
6. Participate as a sponsor, associate sponsor, or contributor in the Multi-District World Project Fair.
7. Attend 2021 Virtual District Assembly Part I (May 15, 2021) or Part II (May 22, 2021) .
8. Attend a Rotary Leadership Institute Training Program (RLI) and complete all training curriculum.
9. Attend the District Conference in April 2022.
10. Meet with Lt. Governor Administration and registered (login and password) on my rotary ([www.rotary.org](http://www.rotary.org)) and club runner ([www.rotar5930.org](http://www.rotar5930.org)) account by August 1, 2021 for your club members.
11. Participate in a Polio Day event or fundraiser.
12. Participate with your Area Clubs and Assistant Governor (AG) in a Service Project together.

The District Governor's Circle of Excellence Recognition Award is designed as a pathway for each club to engage with their designated Assistant Governor and serves as a two-way communication link between clubs and the District Leadership committees.

Upon completing these requirements a Circle of Excellence Clubs will receive a certificate and trophy, with special recognition given at a District Event and recognition will be given on the District Website, and Facebook.

Note: Deadline for completion is June 20, 2022.

# PEACE THROUGH ROTARY RECOGNITION AWARD

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2021-2022  
Goals

**Information to be provided by DG  
Chapa to Presidents at a later date**



# 2021-2022 District 5930 Action Plan

A plan for and by People of Action making a difference.

Together we can follow a path to a stronger, more effective, and vibrant year. At the center of the effort is our Action Plan that will help us become the Rotary we want to be, and the Rotary our communities need us to be.

The Action Plan builds on the extraordinary abilities we have developed in our own professional lives and careers, and it plays to our strengths as leaders, presidents, and committees.

To create our plan, we looked at data, foundation giving, membership projections, and emerging social trends. We assessed what it would take to move from where we are now to where we want to be. Our Action Plan is ambitious, and attainable in a time of extraordinary challenges.



**QUESTIONS**