District 7750 AG Training January 8, 2022

Joyce Morin,
District Governor
2022-2023

Rotary
District 7750

Agenda

Goal: Assistant Governors will participate in activities to assist in learning their roles and the expectations of their appointment.

8:30 – 9:00   Coffee and Fellowship

9:00 – 9:10   **Welcome and Introduction**

9:10 – 9:30   **AG Activity**… Get to Know the AGs

9:30 – 10:30   **Roles and Responsibilities of AG**
> DG Vision
> AG Expectations
> Communication: DG - AG - Club Presidents - Members
> Club Visits
> AG Timeline
> AG Meetings
> AG Budget and expense report
> AG Ranking Reports: Rotary Central
> Role with Membership and Foundation

10:30-10:40   **Break**

10:40-11:40   **Get to Know Your Clubs**
> Membership
> Foundation

11:40-12:15   **Be a Great AG**
State of the District
> Best Practices
> Club Visits
> Working with your home club
> Communication with clubs the first year
> Shaping club dynamics (satellite clubs)
Changing Club Culture
Discussion Q and A as time allows

12:15 – 12:45   **Lunch**

12:45 – 1:45   **Online Tools**
> District 7750 resources
> DACdb Resources and reports
> Rotary International Resources
> Rotary Central
> Membership and Foundation Reports
> AG Club Quarterly Ranking Report
> Rotary Learning Center

1:45 – 1:55   **Break**

1:55 – 2:55   **Club Planning Guide**
> Review the Club planning guide prepare to assist the Club Presidents at PrePETs

2:55 – 3:15   **DG Priorities and Q & A**
> Governors Excellence Award
> Rotary Citation (awarded by Rotary International President)
> Area of Focus Award
> Official Visit Schedule
> Role of District Administrator

3:15 -3:30   **Summary Activity**

            Adjourn

Assistant Governors Training
Table of Contents

District Leadership Team
2022-2023

District Governor

Morin, Joyce
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Home: 803-285-0587
Email: jmorin@comporium.net

District Governor-Elect

Stubbs, Renee Cousins
Mobile: 864-313-1193
Home: 864-313-1193
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Email: rcstubbs@att.net

District Governor-Nominee

Bush, Rysheeka
Mobile: 803 522-2233
Email: rysheeka@yahoo.com

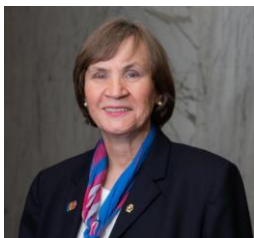**Immediate Past District Governor**

Cox, Frank Johnson
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Email: fcox63@yahoo.com

District Rotary Foundation Chair

Padgett, Mary Elizabeth
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Membership Chair

Burdette, Carol E.
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Fax: 864-226-3430
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Assistant District Governor, Area 1
Anderson, Clemson, Clemson Sunrise,
Greater Anderson

Pollock, Sara Elizabeth (Mitch)
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Assistant District Governor, Area 2
Seneca, Golden Corner, Walhalla,
Westminster

Assistant District Governor, Area 3
Greenville, Greenville Breakfast, Greenville
City Center, Pleasantburg

Brenner, Dave
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Assistant District Governor, Area 4
Inman, North Spartanburg, Spartan West,
Spartanburg

Assistant District Governor, Area 5
Blacksburg, Clover, Gaffney , York

![Rotary District 7750 logo]

District Leadership Team
2022-2023

Assistant District Governor, Area 6
Fort Mill, Indian Land, Indian Land Lunch,
Lake Wylie, Rock Hill

Blancke, Ryan
Mobile: 8032425868
Email: ryan.blancke@yorkcountygov.com

Assistant District Governor, Area 7
Chester, Lancaster, Lancaster Breakfast,
Winnsboro

Sims, Shamieka Johnson
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Assistant District Governor, Area 8
Aiken, Aiken Sunrise, Batesburg-Leesville,
North Augusta

Landy, Carmen
Mobile: 803-634-7399
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Fax: 803-641-4161
Email: clandy107@cs.com

Assistant District Governor, Area 9
Abbeville, EClub of the Carolinas,
Emerald City, Greenwood

Tinsley, Jamison Jr.
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Assistant District Governor, Area 10
Clinton, Laurens, Newberry, Union

Kitchens, Kimberly A.
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Assistant District Governor, Area 11
Fountain Inn, Golden Strip Sunrise, Mauldin, Simpsonville

Bunn, Norman W.
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Fax: 732-568-7645
Email: norman.bunn@craftedsolutions.com

Assistant District Governor, Area 12
Easley, Pickens, Reedy River Greenville, The Foothills

Mullikin, James T.
Mobile: 864-884-2350
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District Secretary

Knapp, David W.
Mobile: 864-901-5158
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Work: 864-757-9652
Fax: 864-757-9654
Email: Dave@epgvl.com

District Administrator

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Work: 864-314-6193
Fax:
Email: faline57@charter.net

Rotary International District 7750

Club Leadership
2022-23

District Governor: Morin, Joyce

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Cell: 803-287-6247

District Administrator: Line, Faith A.

Email: faline57@charter.net
Office: 864-314-6193
Home: 864-314-6193
Cell: 864-314-6193

Club Name	President (P)	President-Elect (PE)
Abbeville Thursday at 01:00 PM The Belmont Inn		
Aiken Monday at 12:00 PM Newberry Hall	Wiseman, Grant B. *Email:* atwinfather@gmail.com 803-648-5497 (O) 803-295-8126 (M)	Samaha, Ahmed F. *Email:* ahmeds@usca.edu 803-641-3411 (O) 803-641-9741 (H) 803-646-5738 (M)
Aiken Sunrise Thursday at 07:00 AM PEACE LUTHERAN CHURCH 202 Richland Avenue W. Aiken	Keenan, Ginger *Email:* gingerlkeenan@gmail.com 8035222622 (O) 8035222622 (H)	
Anderson Tuesday at 12:00 PM Tucker's Restaurant, 3501 Clemson Blvd, Anderson, SC 29621	Herbert, Kylie B. *Email:* development@habitatanderson.org 864-375-1177 (O) 864-367-9672 (H) (864) 367-9672 (M)	Brock, Liz *Email:* liz.brock@uwandersoncty.com 843-910-7702 (M)
Batesburg-Leesville Tuesday at 12:00 PM Angelo's (Except 5th Tuesdays - Board Meeting)	Shull, Lancer *Email:* lancershull@gmail.com 310-493-3056 (M)	
Blacksburg Thursday at 05:30 PM Kelly's Steak House	Elliott, James E. *Email:* edelliott52@att.net 864-489-1298 (H) 864-490-0728 (M)	

Carolina Foothills Tuesday at 12:30 PM Currently meeting at Inman First Baptist Church Fellowship Hall	Hughey, Jill *Email:* jill.hughey@edwardjones.com 864.472.4622 (O) 864.216.3081 (H)	
Chester Tuesday at 01:00 PM Rhino's Restaurant and Lounge	Corbett, William Cyrus *Email:* corbettwc@gmail.com 803-385-2114 ext 27 (O) 803-209-5635 (M)	
Clemson Monday at 12:00 PM Clemson United Methodist Church	Touya, Eric *Email:* etouya@clemson.edu 864-656-3540 (O) 516-424-3131 (M)	
Clemson Sunrise Friday at 07:00 AM Sole on the Green in Clemson.	Sancho, Ri'Cha ri *Email:* richarisancho@outlook.com 8643726264 (O) 8646344667 (H)	
Clinton Tuesday at 12:00 PM Clinton Presbyterian Community Small Dining Room	Hughes, Walter Morehead III *Email:* whughes@sadlerhughes.com 863 833-4000 (O) 864 923-5023 (M)	Dowdy, Lacresha Shantay *Email:* lacreshadowdy@aol.com 864 923-0884 (M)
Clover Wednesday at 12:00 PM First Baptist Church Clover	Wright, Kaitlyn *Email:* katiewright@ymcaup.org 803-831-9622 (O) 803-325-4491 (M)	
E-Club of the Carolinas Tuesday at 06:00 PM Join us for our Weekly Meetings of Fellowship and Programs Tuesdays at 6 pm	Floyd, Laurens Wilson Jr. *Email:* laurensfloyd@hotmail.com 803-316-3686 (H) 803-236-1617 (M)	
Easley Tuesday at 12:30 PM West End Hall/Carr Conference Center	Sevic, James A. *Email:* asevic@easleyutilities.com 864-859-4013 (O) (864) 841-2024 (H) 864-421-3293 (M)	
Emerald City (Greenwood) Wednesday at 07:30 AM Main Event (next door to Sports Break)	Strayer, Rachel S *Email:* RachelStrayer14@gmail.com 864-618-4400 (O) 717-701-3130 (M)	
Fort Mill Wednesday at 12:00 PM Fort Mill Golf Course Oak Room 101 Country Club Drive, Fort Mill	Benton, Keith R. *Email:* keith.benton@foundersfcu.com 803-326-1707 (O) 803-547-0208 (H) 8038049586 (M)	Spears, Kristy *Email:* kristy.spears1@gmail.com 803-548-5594 (H) 704-906-4063 (M)
Fountain Inn Monday at 12:15 PM Rotary Civic Center 307 S. Main Street Fountain Inn, South Carolina 29644	Williams, John C *Email:* Chriswilliams.hr@gmail.com 770-871-8731 (H) 770-871-8731 (M)	Haymond, Adam *Email:* Haymond.adam@yahoo.com 8645049967 (M)

Gaffney Tuesday at 12:00 PM Stephenson Dining Hall, Limestone College		
Golden Strip Sunrise Thursday at 07:15 AM Carolina Fine Foods	Vaughan, Marion D. *Email:* mdv8@att.net 864-380-5280 (M)	
Greater Anderson Thursday at 12:30 PM Sullivan's Metropolitan Grill	Cameron, April W. *Email:* april@andersonmagazine.com 8642218445 (M)	McLeod, Sylvia R *Email:* Slollis@yahoo.com 864-934-4494 (M)
Greenville Tuesday at 12:00 PM Westin Poinsett Hotel (2nd & 4th Tuesdays)	Kolb, Wade Stackhouse III *Email:* wkolb@wyche.com 864-242-8306 (O) 803-491-4127 (M)	Mangione, Lisa *Email:* lisa.mangione@gvltec.edu 864-250-8461 (O) 864-561-4404 (M)
Greenville Breakfast Friday at 07:00 AM	Maertens, Anne Marie *Email:* anniemaertens@gmail.com (864)467-3650 (O)	
Greenville City Center Friday at 12:30 PM The Poinsett Club	McKinney, William B. *Email:* mckinneywb@gmail.com 864-506-5084 (O) 864-506-5084 (M)	
Greenwood Tuesday at 12:00 PM The Inn on the Square (2nd & 4th Tuesdays) Lunch 12 noon, meeting 12:30	McKinney, George H. II *Email:* gandsmckinney@wctel.net 864-942-8553 (O) 864-229-3856 (H) 864-554-3165 (M)	
Indian Land Thursday at 07:30 AM Black Horse Run Clubhouse		
Indian Land Lunch Tuesday at 12:00 PM Towne Tavern	Blackmon, Albert J *Email:* blackmoj@mailbox.sc.edu 803-313-7089 (O) 704-936-7271 (H) 704-936-7271 (M)	
Lake Wylie Tuesday at 12:00 PM Clover School District Community YMCA Lake Wylie, SC	Drahola, Bernie *Email:* bernie.drahola@drahola.com 7045266056 (O) 7042566056 (M)	
Lancaster Thursday at 12:30 PM USCL Carole Ray Dowling Building	Williamson, Matherline *Email:* mwilliam@mailbox.sc.edu 803-313-7126 (O) 803-286-5730 (H) 803-804-7388 (M)	
Lancaster Breakfast Wednesday at 07:00 AM Carole Ray Dowling Center on the campus of USCL	Catledge, Chad *Email:* chad@perceptionbuilders.com 803-286-9500 (O)	Fesperman, Ramey *Email:* ramey.fesperman@foundersfcu.com 803-289-5100 (O) 704-232-4318 (M)

Laurens Thursday at 01:00 PM City Hall Community Room / Third Floor	Eplee, Daniel *Email:* dkeplee@umcsc.org 8649847696 (O) 8033184913 (M)	
Mauldin Tuesday at 12:15 PM Mauldin Cultural Center (old Mauldin Elementary School)	Leon, Wilfredo Jr. *Email:* latino.newspaper@gmail.com (864) 627-1945 (O) 864-346-6201 (M)	
Newberry Friday at 01:00 PM Temporary Meeting location Sheriff's Office Drill Hall 520 Wilson Rd. every other Friday	Sandor, Scott *Email:* sandor@newberryymca.org 803-276-9936 (O)	Husk, Andrew *Email:* ahusk82@gmail.com 803-768-3117 (O) 712-251-0347 (M)
North Augusta Thursday at 07:15 AM Manuel's Bread Cafe	Smith, Ryan *Email:* Ryan.Smith2@edwardjones.com 803-279-6065 (O) None (H) 803-439-1127 (M)	
North Spartanburg Monday at 12:15 PM CityRange Steakhouse Grill	Zollinger, Marcus *Email:* Zollingerm@aol.com 864-433-1980 (O) 8646806860 (M)	
Pickens Wednesday at 12:30 PM Pickens Presbyterian Church-Fellowship Hall	Short, Marvin *Email:* marvinjshort3@icloud.com 864-313-6967 (O) 864-868-0901 (H)	
Pleasantburg Thursday at 12:30 PM Greenville Hilton. Off site on occasion.	Coulomb, Regina *Email:* rcoulomb@cdanjoyner.com 8644201362 (M)	
Rock Hill Thursday at 12:00 PM --2nd & 4th Thursday's-- Satellite Club -- 1st & 3rd Thursdays--		
Seneca Wednesday at 01:00 PM Lakeside Lodge		
Seneca Golden Corner Wednesday at 07:30 AM Seneca Family Restaurant		
Simpsonville Wednesday at 12:15 PM Rotary Hall, 205 North Maple Street, Simpsonville, SC 29681	Humphries, John Robert *Email:* JHumphries@SimpsonvilleChamber.com 864-688-9553 (O) 704-929-2670 (M)	
Spartan West Thursday at 12:30 PM City Range Grill 774 Spartan Blvd. Spartanburg, SC 29301	Cox, Cheryl Ann *Email:* coxc@sccsc.edu 864-592-4613 (O) 864-497-8670 (M)	

Spartanburg Tuesday at 12:30 PM The Piedmont Club of Spartanburg, SC	Gray, William Joseph *Email:* williamjosephgray@gmail.com 864-585-5678 (O) 864-590-2462 (H)	
The Foothills, Travelers Rest Tuesday at 12:15 PM Green Valley Country Club	Hicken, Leslie W. *Email:* les.hicken@furman.edu 864-294-3193 (O) 864-246-4128 (H) 864-704-7879 (M)	
The Reedy River Greenville Tuesday at 05:30 PM The Hilton Greenville (2nd & 4th Tuesdays Only)	Harry, Cathy *Email:* Cathy@CathyHarry.com 864-775-1070 (O) 864-775-1070 (M)	
Union Tuesday at 12:30 PM Covenant Baptist Church		
Walhalla Monday at 12:00 PM Walhalla Depot However, note that the third Monday of each month, the club is invited to a club Board meeting at the School District of Oconee County's main office	White , Morton *Email:* mortonhite@gmail.com 8642455016 (M)	
Westminster Tuesday at 12:00 PM The Depot Downtown Westminster	Broome, Darryl *Email:* darrylbroome1977@gmail.com 864-638-8255 (H) 864-710-4134 (M)	
Winnsboro Tuesday at 01:00 PM The Women's Club of Winnsboro Meetings take place the first and third Tuesdays of each month.	Lathan, Arthur F. *Email:* arthurlathan@peoplepc.com 803-635-4373 (H)	
York Thursday at 12:30 PM First Baptist Church	Boyd, Robert Dean *Email:* dboyd@york.k12.sc.us 843-535-1053 (M)	

Rotary District 7750
Expectations of Assistant Governors 2022-2023

1. **Attend <u>ALL</u> training and workshop events for AGs**
   - ☐ AG Training Workshop -- **Saturday, January 8, 8:30-3:15** – Greer/Thornblade
   - ☐ Pre-PETS/Leadership Workshop – **February 12, 2022**
   - ☐ PETS -- Friday to Saturday **March 18-19, 2022** – Greensboro, NC
   - ☐ Monthly AG/DG Conference calls – **Schedule to be published**
   - ☐ DG Official Visit + minimum 1 visit per club, quarterly – Rate clubs with comments in RC Central following each club visit. At least first club visit **and** visit with the Club Board in July.
   - ☐ Major District events, including Installation and Awards Banquet, RI Foundation event, All Club Conference and other training events
   - ☐ **Notify District Governor in advance when you cannot attend any of these major District events or Monthly AG/DG Conference Calls**

2. **Role and Responsibilities of AG**
   a. Be a **Club Coach** -- Help them plan and execute successfully. Use the tools to review data, but don't forget the subjective side. What will they do to create memories? Think about strengthening bonds among members and fostering pride. How will they enhance each member's Rotary Experience? How will they share their stories internally and externally?
      - Hands-on helping Presidents Assess their Clubs
      - Strengths and Weaknesses
      - Historical successes and issues
         o Membership history
         o RI Foundation contribution history
         o Service Projects history
         o Sustainability – Identification and depth of future leadership
         o Sharing our Stories
      - ☐ Help Presidents step up expectations of themselves -- Encourage creativity.
         - Membership
         - Foundation
         - Service Projects
         - Sustainability
      - ☐ **Hands-on helping Presidents with Club Plans** if they cannot get started or finish on their own
      - ☐ Help them develop and execute **intentional strategies with measurable goals**
         - Ideas – best practices, things that have worked elsewhere
         - Encouragement
         - Innovations which excite members
      - ☐ **Keep them accountable** to their own goals – Report progress in Rotary Club Central "Goals Center" https://rcc.rotary.org/#/goals

   b. Be a **Club Communicator**
      - ☐ Monthly phone call or meeting to follow up on the DG/AG call.
      - ☐ Follow District Governor's Annual Timeline of activities and deadlines
      - ☐ Maintain and use a current Assistant Governor's Club Visit Checklist
      - ☐ Promote submission of District Newsletter articles

   c. Maintain accountability for deadline dates. See Rotary and District calendars
      - ☐ PEs registered for Pre-PETS by January 31
      - ☐ PES registered for PETS by February 15 (Discount ends January 20)
      - ☐ Club Planning Guide to AGs by May 9 for review; upload final version - District Administrator by May 16
      - ☐ District Governor's Award 2022-23 to AGs by May 9 for review, upload final version - District by May 19
      - ☐ Rotary Citation due by June 30

   d. Club and District Leadership Sustainability -- Identify, mentor, and develop future **club and district** leaders.

Rotary District 7750

Assistant Governor Expense Allowances
for Rotary Year 2022-2023

Each Assistant Governor in District 7750 is eligible for reimbursement of up to $400 per Rotary year to be used for the following items. For those AGs out-of-area, the reimbursement up to $500.

- Mileage at the rate of 58.5 cents per mile to attend club meetings and district functions (rate subject to change in CY 2022-2023)
- Promoting and recruiting of new members (receptions, featured speakers, marketing material, etc.)
- Providing food for monthly/quarterly meetings with Presidents

The district has budgeted funds for AGs to attend Carolinas' PETS. The District will cover registration, which includes lodging.

All Assistant Governors are expected to attend All Club Conference (Columbia in 2023) and the Foundation Banquet, neither reimbursable from the AG expense allowance (for registration or accommodations). You may submit mileage for these trips.

Expense reports are to be submitted to the District Treasurer with receipts attached using the expense form available on the "District Leader > Assistant Governor" page on the district web site (www.rotary7750.org). Submit your expense reports monthly so we can keep up with the budget line. **A completed expense report attached to an email is considered signed.**

District 7750 Expense Reimbursement Form

DESCRIPTION	MEALS	LODGING	TRAVEL	REGISTR	MISC	RUNNING TOTAL
						0.00
						0.00
						0.00
						0.00
						0.00
						0.00
						0.00
					Total Due	0.00

Charge to Budget Category: _____

District 7750 Re-Imbursment Check #

| Totals | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Rotary District 7750

Assistant Governor's
Club Visit Checklist
2022-2023

Club _____

Date _____

Effectiveness of a Club Visit is proportional to preparation.   Before you leave for the club visit, update yourself on the club's progress, and fill in the table below with what you learn. You will want to **print the following** and take with you for conversation with the President:

- ☐ Club Dashboard
    - a. Membership
    - b. Attendance
    - c. Demographics
- ☐ D-7750 Monthly Foundation Summary ("Rainbow" report)
- ☐ Club Recognition Summary (CRS)
- ☐ Governor's Award Spreadsheet
- ☐ Rotary Citation Brochure
- ☐ Club Plan – Review top 3 Strategic Priorities

Topic	Data	Value	From
Membership	Membership Goal (year end)		Rotary Club Central
	Beginning Membership (July 1)		Club Dashboard (DACdb)
	Current membership		
	Net change YTD (loss)		
The Rotary Foundation	Annual Fund Goal		D-7750 Monthly Foundation Summary ("Rainbow" report)
	Annual Fund Contributions YTD		
	Polio Plus Goal		
	Polio Plus Contributions YTD		
	Member Contributions this quarter (# of members)		Club Recognition Summary (CRS) (RC Central)
Upcoming Events & Dates	RLI (various dates)		District Calendar (DACdb) Check Club Members Registered
	Membership Summits	August 6, 2022 August 13, 2022 *Location TBD*	
	District Foundation Dinner & Training	November 3, 2022 TBD	
	Pre-PETS	February, 2023	
	PETS	March, 2023	
	All Club Conference	April or May, 2023, Columbia, SC	
	RI Convention (Melbourme, AU)	May 27-31, 2023	
	DG Installation/Awards Banquet	TBA	
Club Plan Review	Club Plan – Key Initiatives Update – How are we doing on the top 3 strategic priorities?		1. 2. 3.
Other	President-Elect & President-Nominee Identified?		Name(s)
Club Projects	Ask for updates and accomplishments		

District Governor Official Visit

Purpose of the visit:
☐ To allow the District Governor to communicate directly with all Rotarians in the district and answer questions about Rotary International and District 7750.
☐ To listen to club leadership and gain a better understanding of their club.
☐ To encourage Vibrant Rotary Clubs through membership group and member engagement.

Preparation for the visit:
☐ The Assistant Governor for the area will work with the club leadership to confirm the meeting and any special arrangements.
☐ **The District Governor is the program for the Official Club Visit. Please do not schedule another program to take place for their visit. Please allow 30 minutes for the Governor's Program.**
☐ Communicate any special plans you have to the Governor and AG to make sure it fits in with his other plans.
☐ DG Joyce will meet with the board of each club to discuss the club plan, membership, Foundation, what's going well, areas that need extra attention. For lunch clubs, this special Board meeting will take place 90 minutes before the start of the Club meeting unless special arrangements have been made. For breakfast clubs, the special board meeting can take place the night before or after the club meeting.

Introduction of the District Governor and the meeting:
☐ Biographical information will be provided to the Club President and Assistant Governor in advance of the meeting. The Assistant Governor will handle the introduction of the District Governor unless other arrangements have been made.
☐ It is customary that the Rotary Club members stand when the District Governor is introduced and when he has completed his presentation. This form of respect is shown because the District Governor is acting as the official representative of Rotary International President Jennifer Jones.
☐ Presentations of Paul Harris Fellowships, inductions of new members and other honors for Club members are especially appropriate during the District Governor's Visit. Celebrate your Club's successes!

Recognition of the District Governor:
☐ Personal Gifts are strongly discouraged. If a Club wants to make a gift, please consider a donation to The Rotary Foundation, PolioPlus, CART, or a Back-to-School Booster Gift to a school in your community (such as books, dictionaries, school supplies, backpacks, etc.)

Assistant Governor's Annual Timeline
2022-2023

Month	Activities with Current President	Activities with President-Elect
January 2022 Vocational Service		❑ **Promote Pre-PETS, February 12, 2022** ❑ Assistant Governor Training January 8 ❑ PETS Discount Ends on January 20 Last day for PETS discount ❑ **Confirm Registration for PETS** -- watch www.carolinaspets.org ❑ Confirm Election of President-Nominee, and promote PETS attendance ❑ Help PEs complete **Team Selection** section of Planning Guide ❑ **Confirm registration for Pre-PETS** ❑ Attend future Zoom meetings ❑ **Jan. 31 – Contact PE for introduction and conversation**
February 2022 Peace & Conflict Prevention/Resolution		❑ **Feb. 12 – PrePETS; Participate with PEs/PNs** ❑ Feb. 15 – Last day to register for PETS ❑ Remind PEs whose clubs are eligible that District Grant application is due April 30, 2022 ❑ Face-to-face Planning sessions to start planning process • Help them with the **Club Assessment** section of Planning Guide
March 2022 Water & Sanitation		❑ Remind Clubs – Completed Grant report due March 30 ❑ March 17 – Consider hosting your PE/PNs for dinner the evening prior to PETS (The District will reimburse you) ❑ **March 18-19 – PETS – with PEs, PNs and AGs – Greensboro, NC** ❑ Check on completion of **Vision and Goals** section of Planning Guide ❑ Check to see if the current President is on target to meet deadline for final grant project report (deadline March 31) ❑ Remind PEs whose clubs are eligible that District Grant application is due Apr 30, 2022
April 2022 Maternal & Child Health		❑ April 30 - Remind PEs whose clubs are eligible that District Grant application is due. Check to see if grant application is submitted. ❑ Face-to-face review of **Strategies and Action Plans** section of Planning Guide
May 2022 Youth Services		❑ Encourage attendance at Awards/Installation event ❑ Review Club Plans; negotiate club goals with District chairs if necessary. ❑ Help with Club Budget, if needed ❑ Membership and Foundation Goals in RC Central for 2021-2022 PE should submit Club Plan to AG by May 9 ❑ Confirm club submits final version of Club Plan to District Administrator by May 16
June 2022 Fellowships		❑ Participate in Club Installation or Changing of the Guard meeting, if invited ❑ Confirm Joint BOD meeting date – participate if invited ❑ **Remind Presidents/PEs to attend District Awards/Installation Banquet - June 16, 2022 – Lancaster**

Assistant Governor's Annual Timeline
2022-2023

	2022-23 Year Begins	
July 2022	❑ Confirm BOD meeting schedule ❑ Confirm goals entered into Rotary Club Central ❑ Confirm approved budget in place ❑ Visit each Club in your Area with message from RI President Jennifer Jones and Governor Joyce Morin ❑ Confirm Club Budget is in place ❑ **Reminders about District events** ❑ Confirm and/or participate in Club Plan review w/BOD and Committee chairs ❑ Encourage Club Assembly ❑ Promote Membership Summits August 6 and 13 ❑ AG/DG Call	❑ Meet and greet general membership

August 2022
Membership &
New Club Development
	❑ **Membership Summits – August 6 & 13**
	❑ Rate clubs in RC Central after Club visit in Q1
	❑ Confirm District and RI Semi-Annual dues paid
	❑ Run Member Compare in DACdb
	❑ Membership Month — Bring a Friend
	❑ Encourage clubs to hold Membership focused Club Assembly
	❑ AG/DG Call
		❑ Work with PEs and PNs (as identified)
		  • Get their commitment to Area Training
		  • Get their commitment to RLI, Pre-PETS and Carolinas' PETS

September 2022 Basic Education & Literacy	❑ Review Membership Progress - refocus if needed ❑ Remind Clubs to turn in TRF, Polio & CART funds ❑ AG/DG Call	❑ Encourage Attendance of President-Elect at Review of Membership Progress
October 2022 Economic and Community Development	❑ **Promote District Foundation Dinner and Grants Training on November 3, location TBD** ❑ Encourage Clubs to Celebrate World Polio Day on October 24th with Area or Club Activities ❑ Encourage clubs to elect at least PE/PN by November 30 and to elect Secretary/Treasurer by December 31 ❑ Run Member Compare ❑ AG/DG Call	❑ **Promote Pre-PETS, February 2023** ❑ **Promote PETS, March, 2023**
November 2022 The Rotary Foundation	❑ Club Visit (Q2) -- Rate clubs in RC Central ❑ Promote registering RI Convention in Melbourne, Australia, ❑ Confirm election of PE/PN by November 30 with data entered into DACdb ❑ AG/DG CAll	❑ Congratulate and introduce yourself to elected President Elect and President-Nominee. Help clubs identify and elect missing PEs and PNs
December 2022 Disease Prevention & Treatment	❑ Review Membership Progress with President and Board ❑ Do Member Call ❑ Remind Clubs to turn in TRF, Polio & CART funds ❑ AG/DG Call	❑ Promote Registration for PrePETS - Watch the Backroom in DACdb ❑ Remind PE about **PETS March 2023 in Greensboro**

Assistant Governor's Annual Timeline
2022-2023

January 2023
Vocational Service
	❑ **Promote Pre-PETS**
	❑ Review Rotary Citation with President and Board
	❑ Review Governor's Award with President and Board
	   • Remind them of accomplishment deadlines
	   • Remind them of due dates
	   • Help them score points
	❑ AG/DG Call
		❑ **Confirm discount Registration Deadline for PETS**
		❑ Confirm Election of President-Nominee, and promote PETS attendance
		❑ Help PEs complete **Team Selection** section of Planning Guide
		❑ **Confirm registration for Pre-PETS**

February 2023 Peace & Conflict Prevention/Resolution	❑ Club Visit (Q3) -- Rate clubs in RC Central ❑ Encourage Club for last-half membership push ❑ Confirm RI Semi-Annual Dues Paid ❑ Review Club Plan and Goals - help them refocus on intended strategies and action plans ❑ **Encourage them to register for the All Club Conference Columbia, SC** ❑ AG/DG Call	❑ Participate with PEs/PNs in Pre-PETS ❑ Remind PEs whose clubs are eligible that District Grant application is due April 30, 2023 ❑ Face-to-face Planning sessions to start planning process • Help them with the **Club Assessment** section of Planning Guide
March 2023 Water & Sanitation	❑ Work on and review Governor's Award applications ❑ **Remind Clubs – Completed Grant report due March 31** ❑ **Encourage them to register for the All Club Conference Columbia, SC** ❑ Encourage attending RI Convention in Melbourne, May 27-31 ❑ Remind Clubs to turn in Foundation, Polio & CART funds ❑ AG/DG Call	❑ PETS – with PEs, PNs and AGs – **March 2023, Greensboro, NC** ❑ Check on completion of **Vision and Goals** section of Planning Guide ❑ **Remind PEs whose clubs are eligible that District Grant application is due Apr 30, 2023**
April 2023 Maternal & Child Health	❑ Club Visit (Q4) -- Rate clubs in RC Central ❑ **Encourage President and Club to register for the All Club Conference, Columbia** ❑ AG/DG Call	❑ Remind PEs whose clubs are eligible that District Grant application is due Apr 30, 2023 ❑ Face-to-face review of **Strategies and Action Plans** section of Planning Guide
May 2023 Youth Services	❑ Remind Pres. & Treasurer to send in TRF Contributions ❑ Encourage attendance at Awards/Installation event ❑ **Encourage Governor's Award submission to AG by May 12 to District Admin by May 19** ❑ AG/DG Call	❑ Help with Club Budget, if needed ❑ Membership and Foundation Goals in RC Central for 2023-2024 ❑ Planning Guide due TBD
June 2023 Fellowships	❑ Participate in Club Installation or Changing of the Guard meeting, if invited ❑ Complete Rotary Citation entries in Rotary Club Central ❑ Review Foundation YTD reports against grant eligibility guidelines and club goals ❑ **Attend District Awards and Installation Event** ❑ AG/DG Call	❑ Confirm Joint BOD meeting date – participate if invited ❑ **Remind Presidents/PEs to attend District Awards/Installation Banquet - June 2023 – DG-E Renee Stubbs's to plan**

2022– 2023
Rotary and District Calendar
Key Dates and Events

Rotary District 7750

February 2022 – PrePETS	
February 12, PrePETS, Newberry College, Newberry	• All PE's are required to attend and all PN's are encouraged to attend.
February 15, PETS registration deadline	• The last date for registration for PETS

March 2022 – PETS and Deadline to Submit District Grant Final Report, Year 2021	
March 18-19, PETS, Greensboro, NC	• For PE's and PN's
March 31, District Grant Final Report due	• Must use form on DACdb

April 2022 – Deadline to Submit District Grant Applications, Year 2022 – 2023 - April 30

May 2022 – Club Plans and Governor	
May 9, Club Plans to Assistant Governor	• PEs should send Club Plans to AG first for review
May 12, Peace & Conflict Resolution Conference, Greenville Convention Center, Greenville	• "Finding Peace in a World Full of Conflict and Bias"
May 13-15, All Club Conference, Winthrop College	• Join Rotarians in Rock Hill the All Club Conference
May 16, Club Plans to District Administrator	• Deadline for Club Plans, email to District Admin at admin@rotary7750.org
May 19, Governor's Excellence Award Due	• Deadline for Governor's Excellence Award

June 2022 – RI Convention and District Awards & Installation Banquet	
June 4 – 8, Rotary International Convention, Houston, Texas	• Join Rotarians to share, learn and get inspired!
June 16, District Awards and Governor's Installation, University of South Carolina - Lancaster	• "Here's Looking at You, Kid!" Enjoy tasty food and wonderful Rotary fellowship in the beautiful town of Lancaster.

August 2022 – Membership Summits – August 6 & 13, Locations TBA

October 2022 – World Polio Day - October 24	
Oct. 24, World Polio Day	• Conduct a fund-raising event for PolioPlus; consider multiple-club event.

November 2022 – Rotary Foundation and Training – November 3

February 2023 – Rotary's Birthday and Pre-PETS	
February 23, Rotary International Birthday.	• Hold an event celebrating Rotary International's birthday.
Pre-PETS, Details TBA.	• Pre-PETS is required for 2023-24 Presidents-Elect and highly recommended for Presidents-Nominee.

March 2023 – Carolinas' PETS and Grants Report Deadline	
Carolinas PETS – Details TBA **March 31,** Grants Report Deadline	• PETS is required for Presidents-Elect and highly recommended for Presidents- Nominee. • Deadline to Submit Final District Grant Report, Year 2022 - 2023
April 2023 – All Club Conference, Columbia – April 28-30, Location TBA	
April 28-30, All Club Conference, Columbia – (Proposed date) **April 30,** Grants Application Deadline	• Experience Rotary. Experience Columbia! • Grant Applications due for Year 2023 - 2024
May 2023 – Club Planning Guide and G Rotary International Convention	
May 15, Club Planning Guide due **May 19,** Governor's Excellence Award **May 27-31**, Rotary International Convention	• Work with Assistant Governor on completion • "Deadline for Governor's Excellence Award • Join Rotarians from around the world in Melbourne, Australia.
June 2023 - District Awards & Installation Banquet – TBA	

DG VISIT SCHEDULE

MEMBERSHIP

POLIO PLUS REPORT

JULY THROUGH JUNE (2021-22)

Club No	Name	Number of Members	PolioPlus Club Goal Amount	PolioPlus Goal %	Prior Year PolioPlus Contribution	-- PolioPlus -- Month	-- PolioPlus -- YTD	-- All Other Funds -- Month	-- All Other Funds -- YTD	-- Total --
District: 7750										
7750	District 7750		$0.00	0%	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
6186	Abbeville, SC, United States	45	$125.00	0%	$125.00	$0.00	$0.00	$0.00	$0.00	$0.00
6187	Aiken, SC, United States	170	$6,090.00	96%	$7,600.00	$0.00	$5,848.00	$0.00	$8,208.00	$14,056.00
23372	Aiken Sunrise, SC, United States	33	$1,510.00	72.4%	$1,685.00	$0.00	$1,093.00	$0.00	$2,625.00	$3,718.00
6188	Anderson, SC, United States	79	$3,040.00	80.6%	$4,188.00	$0.00	$2,450.00	$0.00	$10,150.00	$12,600.00
6189	Batesburg-Leesville, SC, United States	25	$1,200.00	83.3%	$700.00	$0.00	$1,000.00	$0.00	$2,750.00	$3,750.00
6190	Blacksburg, SC, United States	16	$1,088.00	46%	$475.00	$0.00	$500.00	$0.00	$0.00	$500.00
6201	Carolina Foothills, SC, United States	18	$484.00	103.3%	$25.00	$0.00	$500.00	$0.00	$1,400.00	$1,900.00
6191	Chester, SC, United States	47	$1,920.00	135.4%	$1,920.00	$0.00	$2,600.00	$0.00	$0.00	$2,600.00
6192	Clemson, SC, United States	93	$4,590.00	92.5%	$1,719.00	$0.00	$4,247.00	$0.00	$5,902.50	$10,149.50
23983	Clemson Sunrise, SC, United States	37	$1,400.00	92.8%	$1,075.00	$0.00	$1,299.00	$0.00	$6,197.00	$7,496.00
6193	Clinton, SC, United States	38	$225.00	0%	$225.00	$0.00	$0.00	$0.00	$0.00	$0.00
23170	Clover, SC, United States	23	$2,860.00	100.5%	$3,055.60	$0.00	$2,875.00	$0.00	$7,045.00	$9,920.00
6194	Easley, SC, United States	60	$1,000.00	522%	$316.25	$0.00	$5,220.00	$0.00	$22,053.00	$27,273.00
84726	E-Club of The Carolinas, SC, United States	29	$1,600.00	105.6%	$1,959.00	$0.00	$1,690.00	$0.00	$8,877.00	$10,567.00
6195	Emerald City (Greenwood), SC, United States	69	$4,800.00	81.8%	$4,330.00	$0.00	$3,924.13	$0.00	$11,295.00	$15,219.13
28130	Fort Mill, SC, United States	76	$2,000.00	6.3%	$2,300.00	$0.00	$125.00	$0.00	$600.00	$725.00
6196	Fountain Inn, SC, United States	38	$1,100.00	9.1%	$1,100.00	$0.00	$100.00	$0.00	$3,110.00	$3,210.00
6197	Gaffney, SC, United States	66	$500.00	40%	$355.00	$0.00	$200.00	$0.00	$50.00	$250.00
51039	Golden Strip Sunrise, (Mauldin-Simpsonv.-Fountain Inn), SC, United States	15	$1,100.00	100%	$1,100.00	$0.00	$1,100.00	$0.00	$300.00	$1,400.00

POLIO PLUS REPORT

JULY THROUGH JUNE (2021-22)

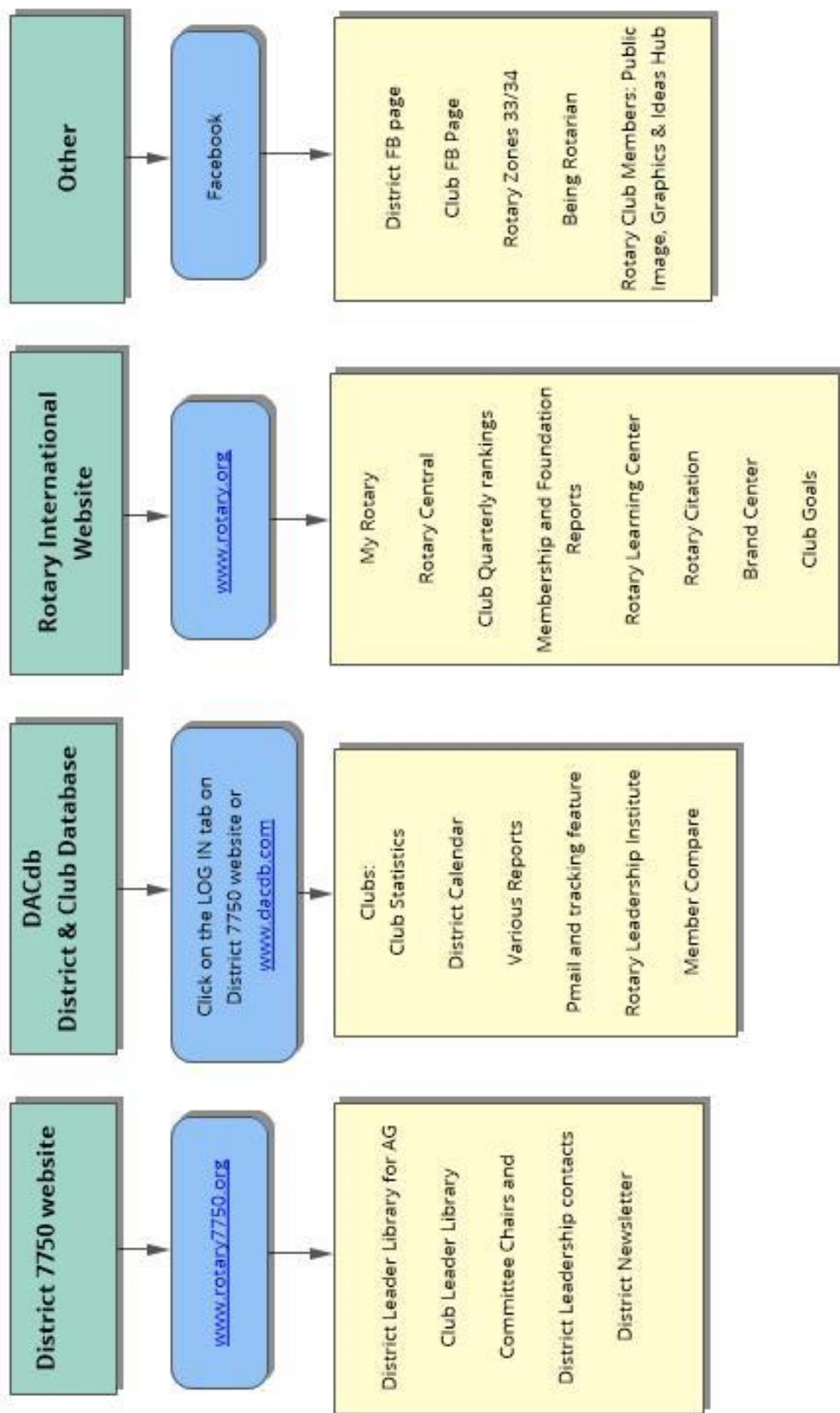| Club No	Name	Number of Members	PolioPlus Club Goal Amount	PolioPlus Goal %	Prior Year PolioPlus Contribution	-- PolioPlus -- Month	-- PolioPlus -- YTD	-- All Other Funds -- Month	-- All Other Funds -- YTD	-- Total --
District: 7750										
21109	Greater Anderson, SC, United States	66	$3,250.00	130.3%	$2,372.30	$0.00	$4,234.51	$0.00	$3,085.00	$7,319.51
24086	Greenville Breakfast, SC, United States	16	$1,200.00	45.8%	$900.00	$0.00	$550.00	$0.00	$3,200.00	$3,750.00
6207	Greenville City Center, SC, United States	58	$1,500.00	36.7%	$300.00	$0.00	$550.00	$0.00	$4,956.00	$5,506.00
6198	Greenville, SC, United States	221	$6,600.00	69.7%	$7,390.00	$0.00	$4,600.00	$0.00	$22,190.00	$26,790.00
6199	Greenwood, SC, United States	115	$4,181.00	108.8%	$33,888.59	$0.00	$4,550.50	$0.00	$4,447.50	$8,998.00
90198	Indian Land Lunch, SC, United States	28	$1,015.00	0%	$128.00	$0.00	$0.00	$0.00	$1,345.00	$1,345.00
74342	Indian Land, SC, United States	12	$25.00	0%	$25.00	$0.00	$0.00	$0.00	$0.00	$0.00
83370	Lake Wylie, SC, United States	27	$1,600.00	37.5%	$1,695.00	$0.00	$600.00	$0.00	$2,120.00	$2,720.00
21979	Lancaster Breakfast, SC, United States	52	$1,000.00	185%	$1,000.00	$0.00	$1,850.00	$0.00	$4,688.00	$6,538.00
6202	Lancaster, SC, United States	55	$2,700.00	79.2%	$5,340.00	$0.00	$2,138.00	$0.00	$6,660.00	$8,798.00
6203	Laurens, SC, United States	46	$2,500.00	50%	$2,000.00	$0.00	$1,250.00	$0.00	$2,960.00	$4,210.00
6204	Mauldin, SC, United States	18	$1,125.00	0%	$1,354.35	$0.00	$0.00	$0.00	$100.00	$100.00
6205	Newberry, SC, United States	70	$3,500.00	69.3%	$3,077.00	$0.00	$2,425.00	$0.00	$12,000.00	$14,425.00
6206	North Augusta, SC, United States	21	$525.00	19%	$85.00	$0.00	$100.00	$0.00	$100.00	$200.00
6208	North Spartanburg, SC, United States	31	$1,320.00	14.2%	$465.00	$0.00	$187.00	$0.00	$2,750.00	$2,937.00
6210	Pickens, SC, United States	35	$1,890.00	34.4%	$1,100.00	$0.00	$650.00	$0.00	$975.00	$1,625.00
6211	Pleasantburg (Greenville), SC, United States	40	$7,682.00	100%	$7,000.00	$0.00	$7,682.00	$0.00	$6,616.00	$14,298.00
6212	Rock Hill, SC, United States	64	$2,860.00	113.1%	$1,275.00	$0.00	$3,235.00	$0.00	$25.00	$3,260.00
29757	Seneca Golden Corner, SC, United States	22	$850.00	22.5%	$854.28	$0.00	$191.38	$0.00	$1,240.54	$1,431.92
6213	Seneca, SC, United States	37	$1,020.00	50%	$1,020.00	$0.00	$510.00	$0.00	$3,716.00	$4,226.00

POLIO PLUS REPORT

JULY THROUGH JUNE (2021-22)

Club No	Name	Number of Members	PolioPlus Club Goal Amount	PolioPlus Goal %	Prior Year PolioPlus Contribution	-- PolioPlus -- Month	-- PolioPlus -- YTD	-- All Other Funds -- Month	-- All Other Funds -- YTD	-- Total --
District: 7750										
6214	Simpsonville, SC, United States	41	$714.00	42%	$714.50	$0.00	$300.00	$0.00	$1,797.00	$2,097.00
6215	Spartanburg, SC, United States	170	$9,000.00	0.2%	$7,050.00	$0.00	$20.00	$0.00	$1,410.00	$1,430.00
21342	Spartan West (Spartanburg), SC, United States	27	$1,500.00	6.7%	-$400.00	$0.00	$100.00	$0.00	$1,100.00	$1,200.00
26614	The Foothills, Travelers Rest, SC, United States	14	$130.00	153.8%	$25.00	$0.00	$200.00	$0.00	$0.00	$200.00
61224	the Reedy River Greenville, SC, United States	28	$2,000.00	27.5%	$475.00	$0.00	$550.00	$0.00	$4,360.00	$4,910.00
6216	Union, SC, United States	34	$3,300.00	38.2%	$4,600.00	$0.00	$1,260.00	$0.00	$1,260.00	$2,520.00
6217	Walhalla, SC, United States	20	$100.00	895%	$25.00	$0.00	$895.00	$0.00	$0.00	$895.00
6218	Westminster, SC, United States	26	$1,200.00	45.8%	$530.00	$0.00	$550.00	$0.00	$1,510.00	$2,060.00
6219	Winnsboro, SC, United States	25	$540.00	0%	$25.00	$0.00	$0.00	$0.00	$0.00	$0.00
6221	York, SC, United States	30	$2,825.00	109.6%	$1,825.00	$0.00	$3,097.00	$0.00	$4,273.00	$7,370.00
Total for District: 7750		**2,426**	**$104,284.00**	**73.9%**	**$120,391.87**	**$0.00**	**$77,046.52**	**$0.00**	**$189,446.54**	**$266,493.06**

DISTRICT DDF GOAL	**$49,592**
DISTRICT IDENTIFIED DDF	**$50,000**
AMOUNT NEEDED TO REACH 20% GOAL	**$0**
TOTAL DISTRICT GIVING TO POLIO (Cash + DDF)	**$127,047**

Note: DDF Goal is 20% of your beginning balance as of 1 July, but does not include Endowment Fund earnings. This report includes contributions to PolioPlus Partners where applicable.

Rotary | Online Resources

District 7750 website

www.rotary7750.org

- District Leader Library for AG
- Club Leader Library
- Committee Chairs and
- District Leadership contacts
- District Newsletter

DACdb
District & Club Database

Click on the LOG IN tab on District 7750 website or www.dacdb.com

Clubs:
- Club Statistics
- District Calendar
- Various Reports
- Pmail and tracking feature
- Rotary Leadership Institute
- Member Compare

Rotary International Website

www.rotary.org

- My Rotary
- Rotary Central
- Club Quarterly rankings
- Membership and Foundation Reports
- Rotary Learning Center
- Rotary Citation
- Brand Center
- Club Goals

Other

Facebook

- District FB page
- Club FB Page
- Rotary Zones 33/34
- Being Rotarian
- Rotary Club Members: Public Image, Graphics & Ideas Hub

Created with Inspiration Software

District 7750 Website - www.rotary7750.org

The public can access the District 7750 Website

Important items here are:

- District Leadership
- District Committees and Committee Chairs
- Club Leader Library with important forms and reports
- District Leader Library with important forms and information for Assistant Governors and other District Leaders
- District Newsletter
- Other information pertaining to the district and Rotary International

DACdb – District and Club Database

Access by **clicking the LOG IN** tab on the District Webpage or **www.dacdb.com**
Requires a **member log in**.

Important Items in DACdb:

- Pmail
- Club Statistics
- District Calendar
- Various Reports
- Rotary Leadership Institute

Pmail

Log in to **DACdb**
Select the **District Tab**
Click on the **PMAIL Icon**
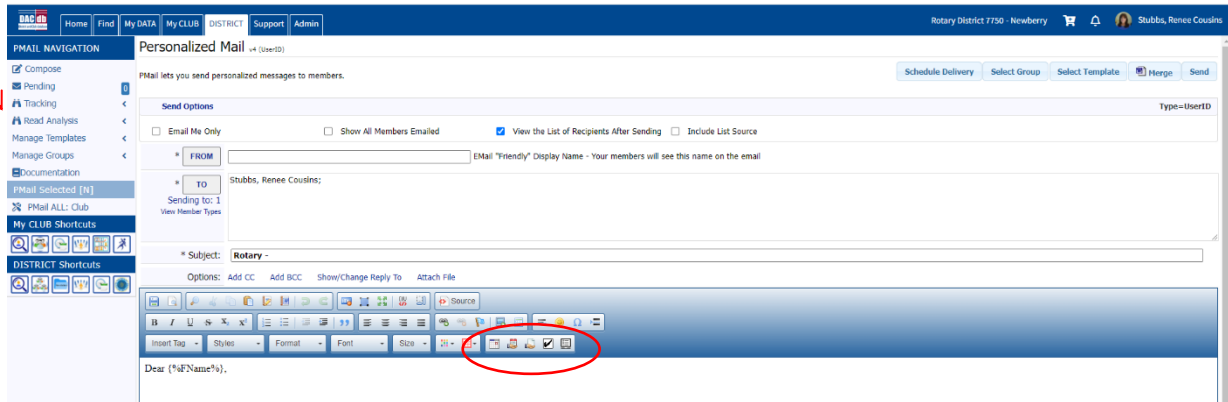**Complete the blanks in the form field**

> **From:** Your Name
> **To:** Click on the **To box** and select the group or person to send the Pmail to from the drop-down list
> **Subject:** Enter the Subject of the email
> **Leave** the Dear {%FName%} in place on the email as this is where the program will insert   the receiver's name.
> **Type the commentary** for the Pmail

The 4 icons circled in Red can be very helpful

The **hand with a little calendar** will allow a **registration Link** to be inserted in the email. This is a personal link only for the recipient of the pmail.

Click Send in the upper right corner to send immediately

Click **Schedule Delivery** to **send at an alternate time**

Tools in the Left Navigation

Tracking – After the pmail is sent Tracking will allow to view the recipients who have opened the email. Caveat here is that some email providers block this activity, so the tracking is not always as accurate as it appears.

Read Analysis - This report shows all members that have been sent a a Pmail in the past **90 days**. Each member's reading habits are detailed to the right of their name, including the percentage of Pmails they have read as well as the average time it has taken them to read their Pmails.

The read rate is approximate. Many factors, including off-line viewing, security settings of the reader and network problems at the reader's end affect whether we can tell if a Pmail has been 'read'.

Use this data as guidance, not gospel.

Club Statistics

Log in to DACdb

Click on the name of a club. There are several ways to look up a club.

For **AGs** the easy way is to:
Select the **District Tab**
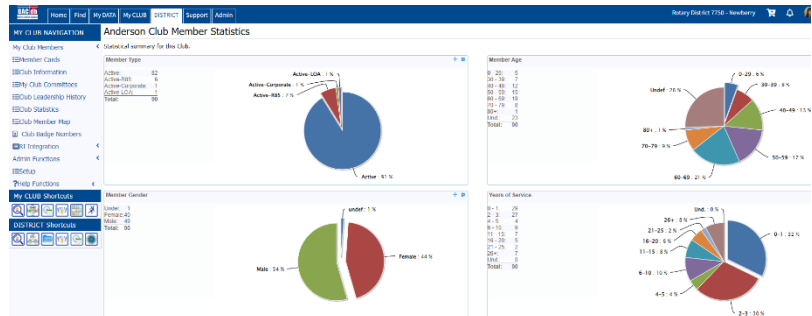**Select** the **Area Icon**
Click on the **Club Name**

In the **left navigation** click on
Club Statistics
Four Charts will represent the
membership data about a club.
This is good for a quick reference about the demographics of a club.

District Calendar

Log in to **DACdb**
Select the **District Tab**
Click on the **Calendar Icon**
Use the **check boxes** at the top to sort the events.
Add events by clicking on the **Add Event** box at the top right on the screen

Encourage clubs to add their service projects, meeting times and online meeting links

The **Back Room feature** allows for being able to see who has registered

 District reports

Log in to **DACdb**

Select the District Reports

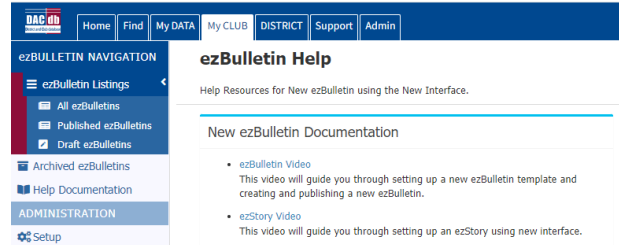This is pretty much a list similar to the reports from the District website.

Other Items in DACdb that can be very useful

Club Easy Story

Club Easy Bulletin

These items are great for club communication.

The **Help Videos** guide the user on how to use these tools.

Rotary International Website – www.rotary.org

Everything on this website is important

Here are a few locations for AGs

- My Rotary
- Rotary Central
- Club Goals
- Club Quarterly Reports
- Membership and Foundation Reports
- Rotary Learning Center
- Presidential Citation
- Brand Center

My Rotary

Go to the RI Website www.rotary.org
Click on My Rotary
Click **Sign in** to My Rotary
Complete the Username and Password that is used to sign in to DACdb

This is an area of the website that only Rotarians can access

*** **The following sections of My Rotary will be of Special Interest to AGs**

Rotary Club Central

www.rotary.org
Log in to My Rotary
Click on the **Manage** Tab at the Top
Click on **District Administration** and then **Rotary Club Central** from the drop-down links

The **Dashboard** appears on the page

Use the tabs: Global, My Zone, My District, Club Group to view membership trends and demographics as well as Annual giving.

Club Group is where you will see the trends of **your Area**

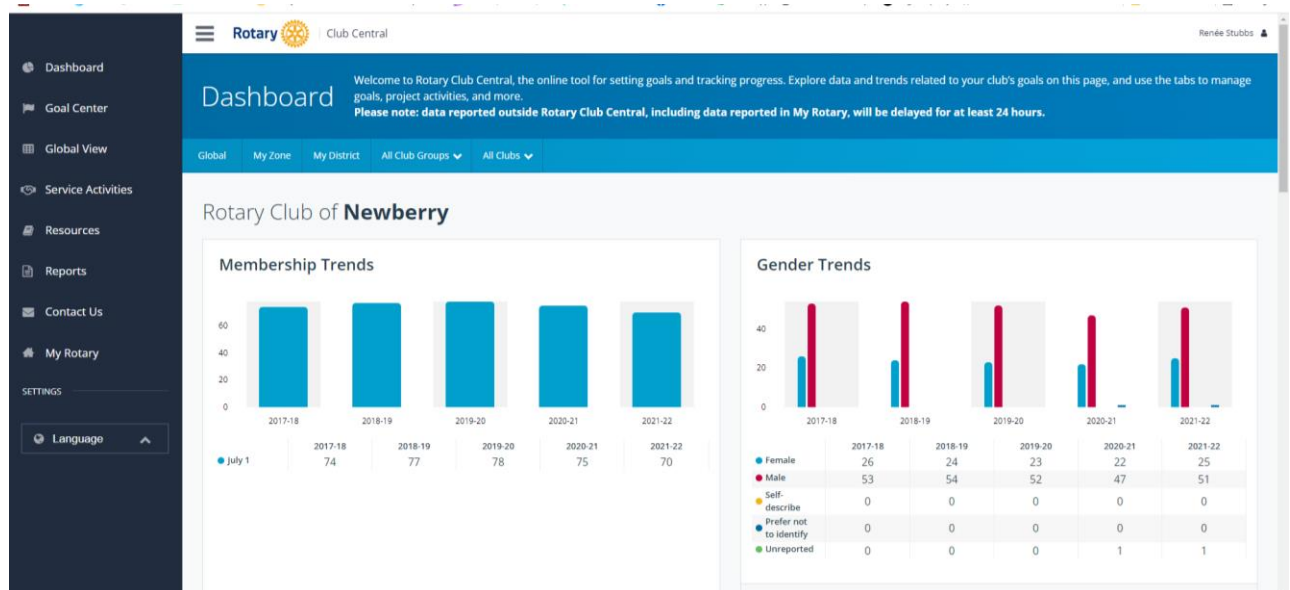Use the **left column navigation** to view the following.

Goal Center

www.rotary.org
Log in to My Rotary
Click on the **Manage** Tab at the Top
Click on **District Administration** and then **Rotary Club Central** from the drop-down links
Click on Goal Center

The Goal Center is where **club presidents** choose and set the goals the club will focus on, and track progress.

Click on the **horizontal tabs:**
Members and experiences,
Rotary Foundation Giving,
Service,
Young Leaders,
Public Image,
to select the area to enter the goals
Click Edit to edit the goals.

To see the clubs in your Area, **Click on Club Group in the blue horizontal bar**

Resources – Resources for help with Rotary Central items

www.rotary.org

Log in to My Rotary

Click on the **Manage** Tab at the Top

Click on **District Administration** and then **Rotary Club Central** from the drop-down links

Click on **Resources** in the **left navigation**

- Step by step guides for viewing and entering information in Rotary Central
- Membership resources like the Club Health Check survey, Membership development resources and more
- Public Image Resources
- Service Resources
- Foundation Giving Resources

Assistant Governor Quarterly Club Rating Report

www.rotary.org

Log in to My Rotary

Click on the **Manage** Tab at the Top

Click on **District Administration** and then **Rotary Club Central** from the drop-down links

Click on **Club Ratings** in the **left navigation**

Once in Club Ratings, you will see all the clubs listed that you are responsible for. You choose the star rating that is appropriate according to the listed criteria and you click on the green box to enter your comments.

Go to **the top right corner** and **click on Add New Comment**

Enter the information in the box and **click Save**

Make sure to SAVE

Reports

www.rotary.org
Log in to My Rotary
Click on the **Manage** Tab at the Top
Click on **District Administration** and then **Rotary Club Central** from the drop-down links
Click on Reports in the left navigation

Click on the horizontal tabs to see Members and Engagement, Foundation Giving or
Service
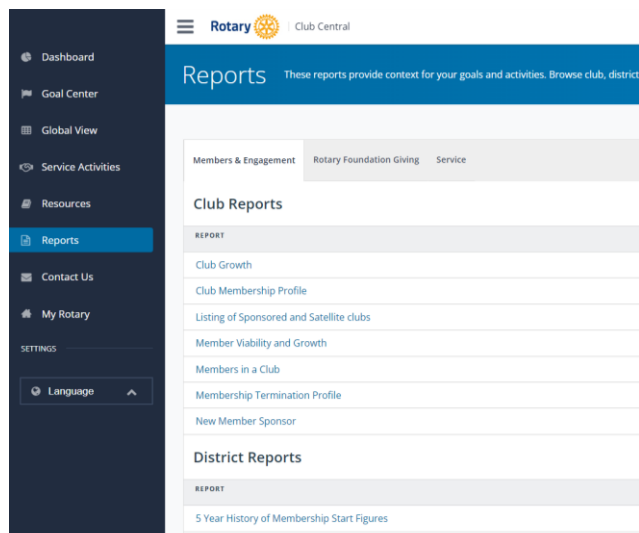
These reports take **several seconds** to be generated. They open in a second window.
Be patient while the little wheel spins.

Membership tab – after going to reports above

Club Membership Profile
Click on a month like July and **click the little arrow** to send it over then **click OK** and wait for the report to generate.
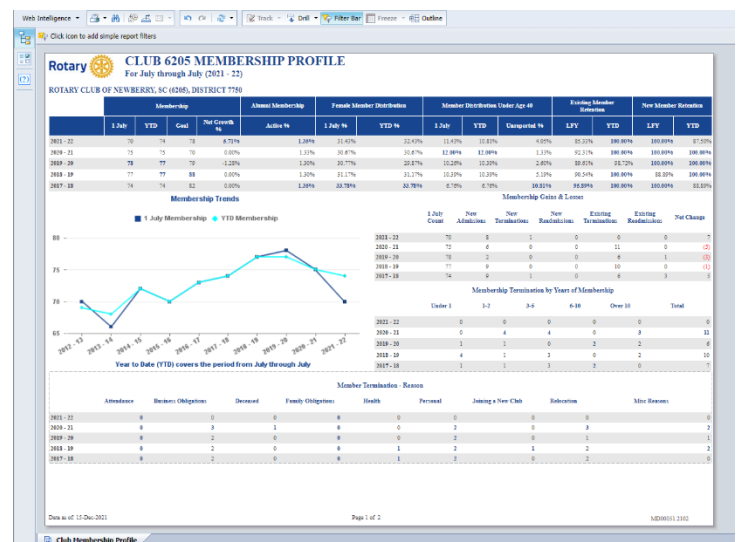
Rotary Foundation Giving tab – after going to reports above

Club Recognition Summary
This report summarizes the Number of PHF, Benefactors etc.

There are other reports as well.

Other Reports of Interest

Log in to My Rotary
Select Manage tab

Select Club and District Reports form the drop down followed **by Reports** in the second drop down menu

Rotary Citation can be found near the bottom of the list **under Awards**
Individual Donor Report – Only gives your personal Donor history
Status of Club Members – A report of members who have logged in to My Rotary and have accounts.

Rotary Brand Center

Log in to **my Rotary**
Select the **Manage tab**
Select **Brand Center** from the Drop-Down menu

- Learn about the Rotary Brand and why using the brand correctly is important to our organization.
- Create Club Logos using the Rotary brand
- Create Club brochures and materials
- See marketing materials like videos and ads
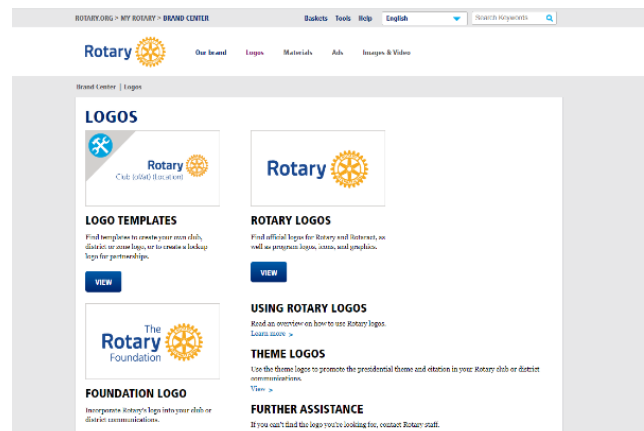
Rotary Learning Center

Log in to **My Rotary**
Select Learning and Reference tab
Select Learning Center from the Drop Down

Select the virtual courses to enroll in

CLUB PLAN

PolioPlus Report

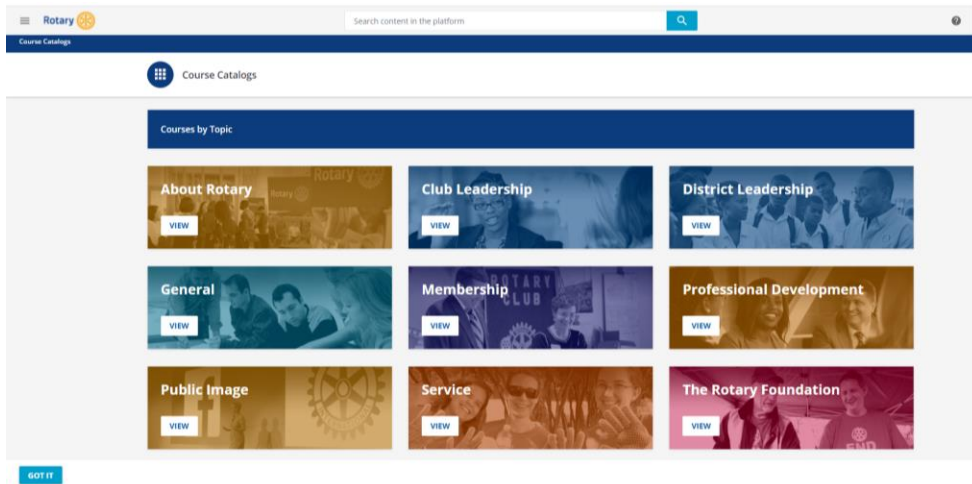| Club No	Name	Number of Members	2019-20 PolioPlus Contribution	2019-20 PolioPlus Per Capita	2020-21 PolioPlus Contribution	2020-21 PolioPlus Per Capita
District: 7750 July-June 2020-21						
7750	District 7750		$0.00	$0.00	$0.00	$0.00
6186	Abbeville, SC, United States	45	$125.00	$2.78	$125.00	$2.78
6187	Aiken, SC, United States	183	$3,381.45	$18.48	$7,600.00	$41.53
23372	Aiken Sunrise, SC, United States	32	$1,385.00	$43.28	$1,685.00	$52.66
6188	Anderson, SC, United States	74	$3,755.00	$50.74	$4,188.00	$56.59
6189	Batesburg-Leesville, SC, United States	13	$650.00	$50.00	$700.00	$53.85
6190	Blacksburg, SC, United States	16	$483.19	$30.20	$475.00	$29.69
6201	Carolina Foothills, SC, United States	19	$25.00	$1.32	$25.00	$1.32
6191	Chester, SC, United States	55	$2,960.00	$53.82	$1,920.00	$34.91
6192	Clemson, SC, United States	96	$4,508.00	$46.96	$1,719.00	$17.91
23983	Clemson Sunrise, SC, United States	39	$2,600.00	$66.67	$1,075.00	$27.56
6193	Clinton, SC, United States	37	$600.00	$16.22	$225.00	$6.08
23170	Clover, SC, United States	22	$3,405.87	$154.81	$3,055.60	$138.89
6194	Easley, SC, United States	58	$1,625.00	$28.02	$316.25	$5.45
84726	E-Club of The Carolinas, SC, United States	30	$1,555.00	$51.83	$1,959.00	$65.30
6195	Emerald City (Greenwood), SC, United States	65	$4,255.00	$65.46	$4,330.00	$66.62
28130	Fort Mill, SC, United States	77	$2,225.13	$28.90	$2,300.00	$29.87
6196	Fountain Inn, SC, United States	29	$1,100.00	$37.93	$1,100.00	$37.93
6197	Gaffney, SC, United States	71	$896.00	$12.62	$355.00	$5.00
51039	Golden Strip Sunrise, (Mauldin-Simpsonv.-Fountain Inn), SC, United States	14	$12,025.00	$858.93	$1,100.00	$78.57
21109	Greater Anderson, SC, United States	65	$1,678.23	$25.82	$2,372.30	$36.50
6200	Greater Greer, SC, United States	0	$500.00	#DIV/0!	$500.00	#DIV/0!
24086	Greenville Breakfast, SC, United States	11	$695.00	$63.18	$900.00	$81.82
6207	Greenville City Center, SC, United States	53	$1,345.00	$25.38	$300.00	$5.66
6198	Greenville, SC, United States	221	$7,655.00	$34.64	$7,390.00	$33.44
6199	Greenwood, SC, United States	113	$10,056.00	$88.99	$33,888.59	$299.90
90198	Indian Land Lunch, SC, United States	22	$576.96	$26.23	$128.00	$5.82
74342	Indian Land, SC, United States	19	$250.00	$13.16	$25.00	$1.32
83370	Lake Wylie, SC, United States	25	$1,287.00	$51.48	$1,695.00	$67.80
21979	Lancaster Breakfast, SC, United States	53	$1,130.00	$21.32	$1,000.00	$18.87
6202	Lancaster, SC, United States	64	$4,576.50	$71.51	$5,340.00	$83.44
6203	Laurens, SC, United States	56	$1,346.71	$24.05	$2,000.00	$35.71
6204	Mauldin, SC, United States	20	$1,231.10	$61.56	$1,354.35	$67.72
6205	Newberry, SC, United States	75	$3,738.41	$49.85	$3,077.00	$41.03

6206	North Augusta, SC, United States	25	$700.00	$28.00	$85.00	$3.40
6208	North Spartanburg, SC, United States	35	$705.00	$20.14	$465.00	$13.29
6210	Pickens, SC, United States	41	$452.00	$11.02	$1,100.00	$26.83
6211	Pleasantburg (Greenville), SC, United States	45	$7,300.00	$162.22	$7,000.00	$155.56
6212	Rock Hill, SC, United States	61	$1,974.00	$32.36	$1,275.00	$20.90
29757	Seneca Golden Corner, SC, United States	22	$704.61	$32.03	$854.28	$38.83
6213	Seneca, SC, United States	38	$1,040.00	$27.37	$1,020.00	$26.84
6214	Simpsonville, SC, United States	37	$775.50	$20.96	$714.50	$19.31
6215	Spartanburg, SC, United States	194	$10,020.00	$51.65	$7,050.00	$36.34
21342	Spartan West (Spartanburg), SC, United States	29	$2,065.00	$71.21	-$400.00	-$13.79
26614	The Foothills, Travelers Rest, SC, United States	11	$20.00	$1.82	$25.00	$2.27
61224	the Reedy River Greenville, SC, United States	35	$6,051.00	$172.89	$475.00	$13.57
52048	Twin City of Batesburg-Leesville, SC, United States	19	$1,050.00	$55.26	$675.00	$35.53
6216	Union, SC, United States	40	$5,285.00	$132.13	$4,600.00	$115.00
6217	Walhalla, SC, United States	27	$25.00	$0.93	$25.00	$0.93
6218	Westminster, SC, United States	22	$1,800.00	$81.82	$530.00	$24.09
6219	Winnsboro, SC, United States	29	$25.00	$0.86	$25.00	$0.86
6221	York, SC, United States	30	$2,315.50	$77.18	$1,825.00	$60.83
Total for District: 7750		**2,512**	**$125,933.16**	**$50.13**	**$121,566.87**	**$48.39**

Membership Growth Index Report
Sorted by MGI

District 7750

Club	01-Jul 2017 Mbrs	01-Jul 2018 Mbrs	01-Jul 2019 Mbrs	01-Jul 2020 Mbrs	01-Jul 2021 Mbrs	MGI	Attrition Rate	Avg. Attrition	Avg. Attraction Rate	New Mbrs Per Year	Avg. Net Gain/Loss
Green Line - Growth Clubs - 80%+ likelihood of continued growth, unless something changes											
Indian Land Lunc	0	0	20	22	28	100	17.1%	4.0	57.1%	13.3	9.3
Greenville City Ce	38	37	57	53	58	57	14.9%	8.3	27.4%	15.3	7.0
Batesburg-Leesvil	17	17	14	13	25	47	11.5%	2.0	26.9%	4.7	2.7
Clinton	24	26	31	37	38	46	8.5%	3.0	19.8%	7.0	4.0
Fountain Inn	27	27	27	29	38	41	7.4%	2.3	19.1%	6.0	3.7
Clover	22	17	27	22	23	35	11.1%	2.7	19.4%	4.7	2.0
Clemson Sunrise	28	28	34	39	37	32	10.9%	4.0	19.1%	7.0	3.0
Easley	55	51	60	58	60	18	13.5%	8.0	18.5%	11.0	3.0
Lake Wylie	21	23	25	25	27	17	7.8%	2.0	13.0%	3.3	1.3
Greenville Breakf	15	14	11	11	16	14	28.9%	3.7	34.2%	4.3	0.7
E-Club of The Car	29	27	28	30	29	7	20.7%	6.0	23.0%	6.7	0.7
Anderson	63	74	72	74	79	7	15.6%	11.7	17.8%	13.3	1.7
Blacksburg	13	15	17	16	16	7	8.2%	1.3	10.2%	1.7	0.3
Emerald City (Gre	59	65	69	65	69	6	11.3%	7.7	13.3%	9.0	1.3
Subtotals Green Line								66.7		107.3	40.7

Membership Growth Index Report
Sorted by MGI

District 7750

| Yellow Line - Fragile Balance Clubs - Could go either way, unless something changes ||||||||||||
Club	01-Jul 2017 Mbrs	01-Jul 2018 Mbrs	01-Jul 2019 Mbrs	01-Jul 2020 Mbrs	01-Jul 2021 Mbrs	MGI	Attrition Rate	Avg. Attrition	Avg. Attraction Rate	New Mbrs Per Year	Avg. Net Gain/Loss
Greenwood	111	113	115	113	115	2	14.0%	16.0	14.6%	16.7	0.7
Golden Strip	15	15	14	14	15	0	7.0%	1.0	7.0%	1.0	0.0
North Augusta	18	21	26	25	21	0	13.9%	3.3	13.9%	3.3	0.0
Winnsboro	28	25	30	29	25	0	14.3%	4.0	14.3%	4.0	0.0
Abbeville	47	45	52	45	45	0	14.8%	7.0	14.8%	7.0	0.0
Clemson	93	94	90	96	93	-1	6.8%	6.3	6.5%	6.0	-0.3
Seneca Golden	22	23	24	22	22	-4	8.8%	2.0	7.4%	1.7	-0.3
					Subtotals Yellow Line		39.7		39.7	0.0

Membership Growth Index Report
Sorted by MGI

	Red Line - Failing Clubs - 80%+ likelihood of continued failure, unless something changes										
Club	01-Jul 2017 Mbrs	01-Jul 2018 Mbrs	01-Jul 2019 Mbrs	01-Jul 2020 Mbrs	01-Jul 2021 Mbrs	MGI	Attrition Rate	Avg. Attrition	Avg. Attraction Rate	New Mbrs Per Year	Avg. Net Gain/Loss
Aiken	181	180	181	183	170	-6	13.5%	24.0	11.6%	20.7	-3.3
Laurens	50	49	56	56	46	-6	13.3%	7.0	11.4%	6.0	-1.0
Lancaster Breakfast	61	56	53	53	52	-7	9.5%	5.0	7.0%	3.7	-1.3
Fort Mill	85	82	82	77	76	-7	19.6%	15.3	17.0%	13.3	-2.0
Gaffney	73	72	76	71	66	-8	14.6%	10.3	11.7%	8.3	-2.0
Newberry	74	77	78	75	70	-9	12.1%	9.0	9.0%	6.7	-2.3
Chester	54	53	55	55	47	-11	10.2%	5.3	6.4%	3.3	-2.0
Greater Anderson	71	75	72	65	66	-12	15.8%	10.7	11.3%	7.7	-3.0
North Spartanburg	42	36	39	35	31	-14	13.3%	4.7	8.6%	3.0	-1.7
Lancaster	60	64	65	64	55	-14	13.0%	8.0	8.2%	5.0	-3.0
Spartanburg	189	199	197	194	170	-15	11.8%	22.0	6.6%	12.3	-9.7
Simpsonville	53	48	41	37	41	-15	26.1%	10.3	20.2%	8.0	-2.3
Pleasantburg	43	47	44	45	40	-15	14.0%	6.0	8.5%	3.7	-2.3
Aiken Sunrise	34	39	34	32	33	-15	16.2%	5.3	10.1%	3.3	-2.0
Spartan West	27	32	35	29	27	-16	19.8%	6.0	14.3%	4.3	-1.7
York	38	36	32	30	30	-17	14.1%	4.3	7.6%	2.3	-2.0
Greenville	263	266	268	221	221	-17	20.3%	48.0	13.9%	33.0	-15.0
Carolina Foothills	20	22	22	19	18	-18	15.3%	3.0	8.5%	1.7	-1.3
Pickens	41	43	44	41	35	-19	20.8%	8.3	14.2%	5.7	-2.7
Seneca	46	46	43	38	37	-20	13.6%	5.3	5.9%	2.3	-3.0
the Reedy River	42	36	37	35	28	-22	35.0%	11.7	27.0%	9.0	-2.7
Rock Hill	103	86	64	61	64	-26	25.4%	16.0	13.8%	8.7	-7.3
Westminster	34	35	30	22	26	-26	21.8%	5.7	10.3%	2.7	-3.0
Union	42	46	47	40	34	-26	15.7%	6.3	5.8%	2.3	-4.0
The Foothills,	17	19	12	11	14	-26	29.7%	3.7	16.2%	2.0	-1.7
Mauldin	31	30	25	20	18	-40	28.6%	6.0	9.5%	2.0	-4.0
Walhalla	29	34	33	27	20	-41	21.3%	5.7	3.8%	1.0	-4.7
Indian Land	28	24	20	19	12	-50	47.1%	8.0	23.5%	4.0	-4.0
Greater Greer	14	15	0	0	0	-100	0.0%	15.0	0.0%	0.0	-15.0
Fair Play	15	0	0	0	0	-100	0.0%	0.0	0.0%	0.0	0.0
Woodruff	15	11	0	0	0	-100	0.0%	11.0	0.0%	0.0	-11.0
Twin City of	18	21	20	19	0	-100	66.7%	13.0	12.8%	2.5	-10.5
Greenville-East	19	18	0	0	0	-100	0.0%	18.0	0.0%	0.0	-18.0
							Subtotals Red Line	338.0		188.5	-149.5

District Totals/Averages

1-Jul 2017 Mbrs	1-Jul 2018 Mbrs	1-Jul 2019 Mbrs	1-Jul 2020 Mbrs	1-Jul 2021 Mbrs	Avg. Attrition	Avg. New Members	Avg. Gain/Loss	Avg. Attrition Rate	Avg. Attraction Rate	Avg. Gain/Loss Rate
2,657	2,654	2,648	2,512	2,426	410.7	334.7	-76.0	16.2%	13.2%	-3.0%
Y/Y Gain	-3	-6	-136	-86						

GOVERNOR'S EXCELLENCE AWARD

HOMEWORK

APPENDIX

ROTARY CLUB
HEALTH CHECK

tinyurl.com/rotaryhealthcheck

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.

Rotary Clubs will be provided with the amount of funding allocated for District Grants in November 2021. The deadline for submission of District Grant applications from clubs is April 30, 2022 The amount of funding available per club typically ranges from $1,000 to $5,000. The applicant club must provide a dollar for dollar match for whatever total grant amount is applied for.

The amount of District Grant funding that can be applied for is determined by a Rotary Club's total contributions to the Annual Fund of The Rotary Foundation in 2020-21. The following table describes the maximum grant amounts at the different total contribution levels:

Rotary Clubs contributing less than $50 per capita in 2019-20	Ineligible
Rotary Clubs contributing $50-$100 per capita in 2019-20	Up to $1,000
Rotary Clubs contributing $100 to $175 per capita in 2019-20	Up to $2,500
Rotary Clubs contributing over $175 per capita in 2019=20	Up to $5,000
5th Club in combined per capita and total giving	Up to $6,000
4th Club in combined per capita and total giving	Up to $7,000
3rd Club in combined per capita and total giving	Up to $8,000
2nd Club in combined per capita and total giving	Up to $9,000
1st Club in combined per capita and total giving	Up to $10,000

The attached table provides specific maximum District Grant levels for each of the 50 Rotary Clubs in District 7750.

District Grant Eligibility
2022-2023

Club	Members 7/1/19	Annual Fund	AF Per Capita	Max. Grant Eligibility
Abbeville	45	$3,170.00	$70.44	$1,000
Aiken	183	$27,587.50	$150.75	$2,500
Aiken Sunrise	32	$9,950.75	$310.96	$5,000
Anderson	74	$26,210.00	$354.19	$8,000
Batesburg-Leesville	13	$1,725.00	$132.69	$1,725
Blacksburg	16	$1,510.00	$94.38	$1,000
Carolina Foothills	19	$2,075.00	$109.21	$2,075
Chester	55	$3,950.00	$71.82	$1,000
Clemson	96	$13,600.00	$141.67	$2,500
Clemson Sunrise	39	$6,120.00	$156.92	$2,500
Clinton	37	$4,650.00	$125.68	$2,500
Clover	22	$2,680.00	$121.82	$2,500
Easley	58	$4,725.00	$81.47	$1,000
E-Club of The Carolinas	30	$11,520.28	$384.01	$5,000
Emerald City (Greenwood)	65	$43,846.79	$674.57	$10,000
Fort Mill	77	$31,420.00	$408.05	$9,000
Fountain Inn	29	$1,681.00	$57.97	$1,000
Gaffney	71	$1,640.00	$23.10	$0
Golden Strip Sunrise, (Mauldin-Simpsonv.-Fountain Inn)	14	$2,735.00	$195.36	$2,735
Greater Anderson	65	$8,865.00	$136.38	$2,500
Greenville	221	$55,900.00	$252.94	$7,000
Greenville Breakfast	11	$2,250.00	$204.55	$2,250
Greenville City Center	53	$8,693.00	$164.02	$2,500
Greenwood	113	$30,731.00	$271.96	$7,000
Indian Land	19	$1,000.00	$52.63	$1,000
Indian Land Lunch	22	$5,725.00	$260.23	$5,000
Lake Wylie	25	$3,949.00	$157.96	$2,500
Lancaster	64	$11,465.00	$179.14	$5,000
Lancaster Breakfast	53	$7,437.00	$140.32	$2,500
Laurens	56	$7,720.00	$137.86	$2,500
Mauldin	20	$4,375.00	$218.75	$4,375
Newberry	75	$14,563.00	$194.17	$5,000
North Augusta	25	$260.00	$10.40	$0
North Spartanburg	35	$4,075.00	$116.43	$2,500
Pickens	41	$4,700.00	$114.63	$2,500
Pleasantburg (Greenville)	45	$12,232.00	$271.82	$5,000
Rock Hill	61	$4,487.50	$73.57	$1,000
Seneca	38	$6,888.00	$181.26	$5,000
Seneca Golden Corner	22	$2,625.00	$119.32	$2,500
Simpsonville	37	$5,876.50	$158.82	$2,500
Spartan West (Spartanburg)	29	$5,200.00	$179.31	$5,000
Spartanburg	194	$11,327.00	$58.39	$1,000
The Foothills, Travelers Rest	11	$950.00	$86.36	$950
the Reedy River Greenville	35	$14,025.00	$400.71	$8,000

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Twin City of Batesburg-Leesville	19	$2,317.00	$121.95	$0
Union	40	$4,685.00	$117.13	$2,500
Walhalla	27	$1,150.00	$42.59	$0
Westminster	22	$2,620.00	$119.09	$2,500
Winnsboro	29	$2,865.00	$98.79	$1,000
York	30	$9,068.00	$302.27	$5,000

District Grant Priorities

The District Grants committee has put a great deal of thought and consideration into allocating our available funds among a growing number of grant applications. Needless to say, we are not able to fully fund all the requests. The total of clubs' grant eligibility far exceeds the total available funding.

There are several reasons why funding may range from 100% of the grant request to 0%, with several partial funding levels in between. In general, grants that likely won't be fully funded fall into one or more of these categories:

- **Small number of beneficiaries** -- In some cases only a handful of people receiving benefit from the grant. Preference is given to projects that benefit larger numbers of people.

- **Limited or no Rotarian involvement** -- One of the success factors in attracting and retaining members is doing service projects together. Preference is given to projects that engage and involve multiple Rotarians.

- **Limited sustainability** -- Preference is given to projects that have a lasting impact, without need for ongoing maintenance and support. Projects with a 1-time impact that must be funded again and again receive limited, if any funding.

- **Projects funding other organizations** -- It is our intent to have significant impact on projects developed and conceived by Rotary clubs and executed by Rotarians. Projects where our funding becomes part of the general operating funds of another organization are generally not heavily funded, if at all.

- **Projects with limited Rotary branding** -- Part of our Public Image, leading to attracting and retaining members, comes from the Rotary brand being prominent during and after the project is completed. Projects where our brand gets "lost" or is overshadowed by another organization receive limited funding.

- **Unclear mission or intent** -- Funding is minimal for grants where the purpose or intent of the funding is not clear to the committee, such as "everyday programs" usually funded as a club operating expense.

- **Outside D-7750 Geography** -- District grants are intended for use inside the geography of D-7750. Projects outside the District are generally not funded.

As you build your grant applications, please consider these guidelines. Please note also that the committee is able to consider only the information, data, and facts supplied in the grant application itself. We are not able to fund situations where the need or the benefit is not well understood by the committee. Contact me if you have questions

Sincerely,

Bill Harley
Grants Coordinator
District 7750

District Grants

To apply for a 2022-23 District Grant of $300 to $10,000, you should complete and submit the application no later than April 30, 2022.   Applications will be open in November of 2021
Step 1: To be eligible, a grant must fit within **District Grant Priorities**. Do you want to know what kinds of grants will (or won't) be funded? Check: **District Grant Priorities**
Step 2: Read **Terms and Conditions for District Grants**
Step 3: **Check your club's eligibility**

You may wish to compose your request offline, then copy and paste sections into the form below.
Downloadable **Offline Grants Worksheet** (MS Word format)
If you haven't already done so, before beginning your application, see: **District Grant Application Procedures**.

District Contact
Bill Harley
304 Old Greenville Highway
Clemson, SC 29631
Home: 864-654-9927
Office: 864-653-7629
william.harley@firstcitizensonline.com

District Grant Application

Club Name *

Project Title *
5 words or less

Project Description *
Describe the project, its objectives, and how they will be attained

Community or Neighborhood Served *

Number of Beneficiaries *
STOP HERE if the number of beneficiaries is low – your grant is unlikely to be funded. See District Grants Guidelines

Start Date *
Anticipated Completion Date *
Project must be completed by March 31 of coming year

Will Non-Rotary Organizations be involved in the project?

○   No

○   Yes

Please enter names of Non-Rotary Organizations and upload a Letter of Participation

Other Rotary Clubs Involved in the Project

Number of Rotarians Involved in the Project *

Rotary Branding *

Describe prominence of the Rotary brand during and after the project.

Active Rotary Participation

☐ Assessment of needs and development of project plan

☐ Establishment of a committee of at least three Rotarians to oversee the expenditure of funds

☐ Direct involvement in the implementation of the project

☐ Provision of evidence of community involvement and ownership

☐ Organization of meetings with local service providers, local officials and/or recipients

☐ Promotion of the project to local media, club and district meetings

Describe Rotary's and Rotarians' involvement in the Project *

Project Budget *

Include a complete itemized budget for the entire project

Ownership *

Who will own the equipment, material or supplies purchased with grant funds? (Note: cannot be owned by a Rotarian or Rotary club.) Who will be responsible for maintenance, operating expenses and storage costs of the equipment or supplies?

Proposed Financing

Please list all financing and indicate cash or District Grant fund amounts

Amount contributed by Rotary club(s) *

Amount Requested for D-7750 Grant *

Amount(s) from other sources

Total Project Cost *

Please totalize amounts above

All or Nothing

☐ All or Nothing - consider only if 100% funded

Some clubs have stated that if the grant won't be funded 100% as proposed, they would not be able to do the project. If you prefer this grant be considered ONLY if 100% funded, check this box.

Grant check should be sent to:

Name *
C/O Rotary Club of *
Address *
City/State/Zip *
Phone *
Email Address *

Club President 2021-2022

(President–Elect 2020–2021)

Name *
Address *
City/State/Zip *
Phone *
Email Address *

Club Foundation Chair 2021-2022

Name *
Address *
City/State/Zip *
Phone *
Email Address *

NOTE: NO ELECTRONIC SUBMISSIONS OF FINAL REPORT ACCEPTED. HARD COPY MUST BE MAILED

The Final Report shall include:

1. A highly detailed and clearly organized report of expenses
2. Copies of receipts for purchases made with grant funds
3. Detailed information regarding all beneficiaries of grant funds
4. A detailed account of Rotarian participation in the implementation of the project
5. A detailed narrative delineating the implementation of the project and how experiences garnered will inform/guide the club/district for the next year
6. A minimum of one photograph of the project.

By clicking "Submit" below we agree to the following:

1. The information in this application is true and accurate to the best of our knowledge
2. This application complies with the Terms and Conditions for Rotary Foundation District Grants
3. We understand and will comply with the required Rotarian activities and reporting requirements as stated above
4. We acknowledge that the **FINAL REPORT IS DUE 30 DAYS AFTER THE PROJECT IS COMPLETED OR BY MARCH 31 OF NEXT YEAR--WHICHEVER COMES FIRST**
5. We agree that the **FINAL REPORT SHALL INCLUDE COPIES OF RECEIPTS AND AT LEAST ONE PHOTOGRAPH OF THE PROJECT.**

   _____

   Date

   Time

   I understand and accept the terms and conditions of the Grant *

   ☐   Yes
   (check to indicate)

District Grant Report Instructions

Preparing and submitting a District Grant (DG) report

Step 1: Complete each section of the attached form. Scan form and all receipts related to the project. Complete this report within two weeks of project completion.

Step 2: If necessary, follow up with project contacts to complete missing report information or to address eligibility issues. Please refer to the DG Eligibility Guidelines.

Step 3: Email scanned report, including receipts, with accompanying bank statement(s) to The District Grant Chair or the District Foundation Chair. Emails addresses can be found in the Resource Section of the District Foundation website.

Please note the following:

- Reports must be submitted using the form below. *Please type the report.* Retain a copy of the entire report for your records.

- Clubs should retain original receipts for all grant-funded expenditures and provide copies to the district. The district must maintain copies of all receipts related to grant-funded expenditures in accordance with local laws and for a period of at least five years following closure of the grant.

- Bank statements showing grant deposit and all expenditures related to the grant must be maintained by the club and a copy scanned and emailed as instructed above..

Individual Project Report

Scan and return this completed form to either District Grants Chair or the District Foundation Chair. Email addresses can be found in the Resource section of the District Foundation website.

Rotary Club:
Project Title:
Progress report ☐   Final report ☐

Project Description

1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?

2. How many people benefited from this project?

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

4. How many Rotarians participated in the project?

5. What did they do? Please give at least two examples, not including financial support provided to the project.

6. If a cooperating organization was involved, what was its role?

Financial Report (District must retain receipts of all expenditures for at least five years)

Currency Used: Exchange Rate: = 1 USD

7. Income

Sources of Income	Currency	Amount
1. District Grant funds received from the District		
2. Other funding (specify)		
3.		
Total Project Income		

8. Expenditures (please be specific and add lines as needed)

Budget Items	Name of Supplier	Currency	Amount
1.			
2.			
3.			
4.			
5.			
Total Project Expenditures			

Certifying Signature

By signing this report, I confirm that to the best of my knowledge these District Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate. I also understand that all photographs submitted in connection with this report will become the property of RI and will not be returned. I warrant that I own all rights in the photographs, including copyright, and hereby grant RI and TRF a royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary in RI's sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI and TRF.

Certifying Signature   Date:
Print name, Rotary title, and club

To be completed by the District Rotary Foundation Committee Chair:
District Grant #   Individual Project Report #

Rotary clubs are as resistant to change as any organization - perhaps more than most. That's because the club inherits a culture over time and that culture is propagated by the self-selection of members. Those who like it stay, and those who don't leave. Leaders come out of that same culture and reinforce it.

Yes, your club has a culture, whether it's one you like or not. Long term, that culture embraces the status quo and becomes greatly resistant to change, which is natural. It's a "status quo" mentality.

With respect, for example, to membership, a club's culture can be oriented toward growth and vitality, which is the case with 25%-30% of Rotary clubs. The remainder of clubs are content with rocking along at about the same size, with some dropping an average of 2 members per year. That seems to be within the threshold of pain for most clubs. It's also how your 40 member club gets to 30 over 5 years, and to 20 over the next 5.

What if you're in a failing club and want to turn that trend around? You'll be bucking a culture of mediocrity or decline that's probably taken decades to mature. That change won't happen by itself. You'll need an intentional strategy to change that culture - otherwise it will push back **hard** against the change you're trying to make, in this case putting the club on a consistent, moderate growth path.

The Situation

Most of your members are completely happy with the way things are.

The Problem

Here's what you're probably facing:

- Everyone's happy with the status quo –
    – Expectations are low
    – Everyone's OK with a net decline of a couple of members a year
    – Nobody sees a problem

- **I'm all by myself** -- nobody else "gets it". You now understand that chronic membership decline spells an eventual collapse of the club.

- **They'll be pushing back**, defending the status quo, making excuses -- It's the nature of humans to want to keep things as they are - comfortable. The members don't understand that if a change is not made the club is doomed to failure.

You have to decide whether you're going to become a "Change Agent". If so, you recognize that "Doing more of what we're doing will get us more of what we've got". The status quo will continue unless you act.

Club culture cannot be taken "head-on". Culture can't be changed directly. You have to:

- First: **Change Strategies** to those likely to get the results we want. Decide upon intentional strategies that are known to work and promote those.

- Second: **Change Behaviors** to support the new Strategies and accomplish some **short-term "wins".** This is the "secret sauce" of your change management strategy. You need to get people doing different things than the ones that haven't worked before.

- Third: **Reinforce** the new Strategies and Behaviors and **Culture will follow.** Short-term "wins", along with recognition of those members who are doing what you want will get others onboard.

The Implication

If your club has embraced a culture of decline, it's only a matter of time until someone has to decide on who's turning out the lights. <u>Chronic membership decline is a cultural disease that will kill your club long term</u>.

Checklist for Changing Club Culture

Effecting change in an organization is not accidental. It requires a very intentional, "checklist" approach. Here's a "can't fail" checklist borrowed from John Kotter, a Harvard Business School professor and arguably the world's thought leader in organizational change management. Like any recipe if you skip steps you can expect that the result may not be what you wanted:

What situation in your club could benefit from a change in culture or mindset?

_____

_____

_____

Intentional steps to make that change (make notes on your plan)**:**

☐ Reset the bar - **Redefine what "good" is** - consistent, moderate membership growth. If necessary, create a crisis -- "If we keep doing what we're doing...." Make it an **urgent** priority.

_____

_____

☐ **Assessment** – Use the **Club Health Check** to spot areas that need to be fixed for improvements in both attraction and retention. Members vote with their checkbooks to join and with their feet to leave when their expectations are not met. Take a "Man from Mars" look - from an external perspective.

_____

_____

☐ **Create a Coalition** - Enlist people who see things the way you do. **Include** them in developing your strategy. List candidates:

_____   _____

_____   _____

☐ **Create a Vision --** a future different from the past. Give your members something to believe in. Include your Coalition.

I see our club...

_____

_____

_____

☐ **Build a Script** -- **SPIN**

Situation -- Here are the facts...._____

_____

Problem -- The **problem** with that is.._____

_____

Implication -- If we keep doing what we're doing..._____

_____

Need -- What we need to do is.._____

_____

☐ **Teach** your members how to do what you visualize. They don't know HOW to grow a Rotary club. You do (now). Work on the **club experience** (see Assessment below).   In parallel, work on strategies to **attract** more members to your club.
- o **Different Strategies** (intentional, to get the different results you want)
- o **Different Behaviors** that support the new strategies
- o **Reinforce** the new Behaviors and Culture will follow

_____

_____

☐ **Communicate, Communicate, Communicate** -- Keep membership top-of-mind (step up your initial instinct by a factor of **10**)
- o Face to Face
- o Phone (live conversation vs. voicemail)
- o Email
- o Print - bulletins, handouts
- o Meetings (use your **SPIN** Script)

_____

_____

_____

☐ **Confront** those in the way -- win them over or neutralize them.

_____

_____

☐ Set up some **short-term "wins"** -- Prove that what you're promoting works. **Recognize and praise** the members who are doing what you want. Possible short-term wins:

_____

_____

Keep your **Long-Term Goal** in mind – to **create a growth culture** in your club. We're not running membership drives or campaigns.

Vision Examples:

Works best starting with "I see". What does success look like? What does "good" look like? Inspiring, compelling, and a purpose that's worth the time and energy of those you'd like to have follow you.

- I see our club growing steadily - by 10% or more per year. Those new members will bring energy, service hours and financial contributions that will help us more effectively serve our community. They will also be a steady supply of leaders of the future, so we can have future presidents identified 3 or 4 years in advance.

- I see our club meaningfully contributing to The Rotary Foundation, helping our members understand that there's more to Rotary than our own club. We need to be averaging at least $100/year per member, which would qualify us for District Grants from the Foundation for projects in our own community. More awareness of Rotary beyond our club's boundaries will help attract new members and retain existing members who want to make a bigger impact than our local club can do on its own.

- I see our club becoming far more visible in our community, attracting new members who hear about us and want to become Rotarians. We would have at least one "signature" project a year, highly publicized, and prominently displaying the Rotary brand. Press releases would keep us visible in our local media, and an active social media campaign would keep us visible on the web. We will become **the most-recognized** community service club in our area.

- I see our club reinventing itself, finding ways to attract members and getting back to a sustainable critical mass of at least 25 members. With more members, we can create and fund some new projects that will not only attract new members but also re-energize our long-time members, reminding them of what Rotary is really about. Our meeting will exude energy and include speakers that our members find interesting, informational and inspirational.