

# Agenda

- 1:00 1:45: Your Role In Rotary, Information/Financial Management
- 1:45 1:55: Break
- 1:55 2:40: Working With DACdb, Members Data, Budgeting/P&L Analysis
- 2:40 3:00: Break
- 3:00 3:45: Club Records, Attendance, Dues, Payment Management

Any Initial questions?

Briefly Cover the agenda for the day

Any initial questions?



# Your Role In Rotary Information Management

| Prin | nary Roles  |
|------|---|
| 🗖 Se | ecretary:   |
|      | Ensuring that governing documents are in place.                                   |
|      | Ensure that club member data is current for reporting to Rotary<br>International. |
| 🗖 Tr | reasurer:   |
|      | Manage the financial aspects of the club.   |
|      | See that member dues are billed timely and accurately                             |
|      | Pay Obligations (RI, District, State, Vendors, Etc.) timely and accurately        |

1. ....

### Discussion

What do you think will be your biggest challenge?

Where can you get support?

How can you streamline tasks to support your club efficiently?

### **Club Governance**

### Rotary governance awareness

- Meeting Minutes (Secretary)
- Attendance (Secretary)
- Insurance needs (if applicable) (Secretary)
- FL Sunbiz Report with Fee (Treasurer)
- Accounting/Tax Returns (Treasurer)
- Club Charter/Constitution (Board)
- Club Bylaws (Board)
- 1. Make sure that your club has the most recent Rotary governance documents to refer to as needed.
  - <u>https://my.rotary.org/en/learning-reference/about-rotary/governance-</u> <u>documents</u>
  - Constitution of Rotary International
  - Bylaws (<u>RI</u>Level, <u>Club</u> Level and <u>Rotaract</u> Level)
  - Standard Rotary Club Constitution
  - Manual of Procedure (every 3 years)
  - Rotary Code of Policies
  - Rotary Foundation Code of Policies
  - Rotaract Governance Documents
- Take minutes at club and board meetings and club assemblies. These must be made available if requested.
- Insurance RI provides officer level coverage and club liability. (Jim Register is the district contact for insurance needs)
- RI sends updated Insurance process to club presidents and administrators.
  - Obtain certificate of insurance from RI
- <u>https://my.rotary.org/en/us-rotary-club-and-district-liability-insurance-program</u>
- To report an incident or claim, please email Rotary International Risk Management.
- To obtain a certificate of insurance, insurance policies and summaries, loss prevention strategies, and more, please visit the insurance broker's website, <u>U.S. Rotary Insurance Portal</u>.
- The U.S. Rotary Insurance Portal can be accessed with a username and password that have been emailed to your club and district officers through annual insurance e-mailings or you can

contact Rotary International Risk Management.

## **Club** Data

- The Club <u>Secretary</u> is responsible for promptly reporting membership information to Rotary International in addition to other duties listed in the club constitution and bylaws.
- The Club <u>Secretary</u> needs to report next year's club officers to Rotary International by 1 February.
- The Club <u>Treasurer</u> is responsible for accurate membership fee (and other) billings and for making timely payments of RI and District dues.
- The Club <u>Treasurer</u> needs to manage bank accounts, club financial balance sheets, and P&L statements.
- 1. Someone volunteer to read this slide.
- 2. Discuss points
- 3. Other Duties
- Monthly financial updates to Board (Treasurer)
- Club Correspondence (Secretary)
- Club's historical record (Secretary)
- Annual year end summary (as needed)(Secretary)
- Counting Satellite Club Members (Secretary)
- Moving members to new clubs as needed (Secretary)
- Collect funds for social events (as needed) (Treasurer)
- Assist board/committees as needed (Secretary, Treasurer)
- Promotional items, name badges, banners, etc. (Determine)
- Helping manage membership leads (with membership chair)
- Meet with your successor (Secretary, Treasurer)

### **Preparation** January – June

- Support the <u>President Elect</u> and incoming board to:
  - Conduct Board Orientation
  - Determine committees/chairs based on by laws
  - Decide who manages membership leads
  - Decide who handles club communications

Ensure new club officers are reported in My Rotary so they have access to online tools and resources

#### 1. What Board Orientation takes place?

- 1. Goals Development
- 2. When and where will the Board meet? Get this on calendars. Check by laws for timing requirements, generally monthly
- 3. Determine administrative tasks
- 4. Things to think about/remember
  - 1. Rotary clubs are an "entity" and as such have certain reporting and financial requirements
  - 2. Rotary is a 401c4 organization. Most clubs are <u>not</u> a 401c3.
    - 1. <u>social welfare organizations</u>: Civic leagues or organizations not organized for profit but operated exclusively for the promotion of social welfare
    - 2. District 6970 does have a 401c3 non profit foundation The York Foundation. This can be used as a pass through for donors of significant amounts who want a tax receipt.

### **Preparation** January – June

- Meet with <u>Current Secretary and Treasurer</u> to:
  - Review Club Procedures
  - Review the RI Club Invoice (Both)
  - Discuss current membership process (w/member chair)
  - Get access to the club's records, archives, etc.
  - Prepare a schedule for sending statements of club dues and fees to all members (Both)
- 1. Does your club have a policy/procedures manual (MOPP)
- 2. RI Invoice is assessed twice a year July / January.
- 3. Who sends potential members an invite? Who ensures applicants are converted to "active". Who tracks member engagement?
- Is there a central/secure storage (DACdb library, Google Storage, etc). Ensure continuity of access controls
- 5. How often will dues be assessed? Who is responsible for delinquent dues? Do club bylaws/procedures address the dues process? How are members informed of dues amounts/breakdown (meals, rotary dues, supplies, misc expenses, Foundation contributions, etc.)

## Taking Office

### July

- Update your club information as needed and maintain accurate membership records throughout the year (Secretary)
- Ensure officer, board and committee chair listings are accurate in DACdb (Secretary)
- Ensure you have access to club mailbox (Secretary)
- Make sure the club has received the July club invoice (RI and District) so it can be paid on time (by 7/31) (Treasurer)
- Ensure correct officers are established on signature cards with your club's bank (Treasurer)
- 1. Ongoing
- Important to ensure good communication with district. Ensure the rotary foundation, membership and image chairs are designated.
- 3. Where does paper and electronic mail go? Who is responsible for collecting it? Who has access to USPS mail boxes?
- It is critical that dues to RI and the district be paid on time (July/January)
- 5. If your club uses checks, you must have current/accurate signature cards with your bank.

### Mid Year July – April

#### Attend club and board meetings

- Record Minutes, provide membership/attendance updates Secretary
- Provide Income/Expense updates Treasurer
- Update member records as needed for accuracy Secretary
- Ensure new members are correctly captured in DACdb and at Rotary International (My Rotary) - Secretary
- □ Identify delinquent member payments for Board action Treasurer
- Support annual meeting to elect future officers Both
- 1. Ongoing
- 2. Ongoing
- 3. Ongoing
- 4. Ongoing
- 5. There should be an annual meeting detailed in your bylaws. This should include a process for nominations and elections for next year's board positions, including the critical President Elect position

### Mid Year

July – April

- Assist the club president/board to review club's strategic plan
- Work with Club President to record/capture achievements towards Rotary Citation award (goals)
- Ensure membership counts are accurate as of December 31 to ensure proper district and RI billing
- □ Make sure the club has received the January club invoice so it can be paid on time (by 1/31)

- If your club has a strategic plan and it should help make sure it is reviewed for current and future expectations of the club.
- Ensure RI (Rotary Club Central) is updated with goals progress (with president)
- 3. Critical to ensure membership is accurate in December and June.
- Critical to make payments on time. Charters may be revoked if not.

### Wrapping Up April - June

- Begin briefing next year's Secretary, Treasurer
- Prepare annual summary to the club (as needed)
- Give access to club records to new Secretary, Treasurer
- Ensure incoming officers are captured correctly in DACcb
- Ensure incoming officers attend training as required

Ensure membership counts are accurate as of June 30 to ensure proper district and RI billing

- 1. Work with the incoming secretary and treasurer to help them understand expectations, processes, "insider info", etc.
- 2. If your club publishes an annual summary, work with your board to prepare and publish this.
- 3. Ensure incoming officers have necessary access/passwords to club records. If you use DACdb, this should be pretty easy.
- 4. Incoming officers must be captured correctly to ensure timely communications and access levels.
- 5. PETS1 (Fall), PETS2 (March), District Training (May), Grant Training (ongoing), RLI (ongoing), Vibrant Seminar (August)
- Again, it is critical that membership counts are correct as of June 30 for billing purposes.
  - 1. Note be aware of impacts of not correctly removing members who have left (dues billing, incoming president's goals)

NOTE – THIS SECTION WILL ONLY BE USED IF TIME PERMITS. IT IS IMPORTANT, BUT NOT CRITICAL. MOST PEOPLE SHOULD KNOW THIS INFORMATION

What is Personal Data?

Personal data is any information that can identify a specific individual, either by itself or when it's combined with other information

Three levels of data: High, Medium, Low (Rotary Intl)

### High Sensitivity Data

- Government identification numbers, such as from a passport or driver's license
- Bank account details
- Credit or debit card numbers
- All personal data (including photos, videos, and voice recordings) of someone under age 16
- Health, medical, biometric, or genetic information
- Race or ethnicity
- Political opinions
- Religious beliefs
- Trade union membership status
- Sexual activity or sexual orientation

#### Medium Sensitivity Data

- \* A person's name <u>in conjunction with</u>:
  - Home address
  - Phone number
  - Email address
  - Gender or sex
  - Marital status
  - Spouse's or partner's name
  - Parents' names
  - Occupation
  - Employer
  - Date of birth
  - Foundation giving history
  - Wealth data
  - Photos, videos, and audio recordings of people age 16 and over who are identifiable

### Low Sensitivity Data

- This information is most likely already public, so it would probably have little to no adverse effect on Rotary or the person if it was mishandled. This includes:
  - Name (first, last, or both)
  - Website

- Protecting Personal Data:
- Why am I collecting this data?
- How will I protect this data?
  - Accessing Data
  - Sharing Data
  - Storing Data
  - Transporting Data

#### Why am I collecting this data?

You may collect personal data on Rotary International's behalf for core business purposes — that is, for reasons that are necessary to our essential activities. These purposes could include:

- •Supporting The Rotary Foundation, including fundraising efforts
- •Facilitating convention and event planning
- •Communicating key organizational messages
- •Supporting the programs and members of Rotary
- •Fulfilling Rotary's obligations to members and others

**Accessing data:** You should access personal data only when you need to do so, either to fulfill your duties or for a legitimate business purpose. For example, if you aren't involved in a student's Rotary Youth Exchange experience, you shouldn't access any of their personal data.

**Sharing Data**: Don't disclose personal data for any reason that's not related to the purpose for which it was shared with you. For example, don't share the email addresses of your club members with a speaker who wants to advertise their business.

**Storing Data:** Personal data should be stored in the way that best secures it. Be sure that you have policies for various methods. That may mean storing paper records with highly sensitive data in a locked drawer and protecting electronic files with passwords.

**Transporting Data:** Personal data should not be transported, in either paper or electronic format, unless it is secured in a manner consistent with its sensitivity. Don't enter highly sensitive personal data into instant messaging apps or email credit card or bank account numbers without encrypting them or taking other security measures.

### Explicit Consent required if you gather:

- Personal data about a child under age 16 (get consent from a parent or guardian)
- Health, medical, biometric, or genetic information
- Information about a person's race or ethnicity
- Political opinions or religious beliefs
- Trade union membership status
- Information about anyone's sexual activity or sexual orientation

Explicit consent is a freely given, specific, and informed agreement through which someone actively chooses to provide personal data.

Explicit consent is a freely given, specific, and informed agreement through which someone actively chooses to provide personal data.

## Security

### Phishing

### Security Breech

### Unneeded Data, Data Destruction

Does your club have a written policy of how to manage this?

### Consider a Club Privacy Policy

Template available on My Rotary

<u>Phishing is</u> when attackers use email or websites to try to get you to click a link or download an attachment that will infect your device with malware or viruses designed to collect personal data.

**Spoofing** is a form of phishing in which someone impersonates an individual or organization to make it look like a message is legitimate.

These clues can indicate that an email or website is fraudulent:

- Poor spelling, bad grammar, or awkward wording
- Wrong or misspelled email addresses
- A sense of urgency or threat
- The inclusion of unknown or unexpected links or files
- A request that doesn't adhere to normal processes
- An offer of an unexpected prize or money

Don't interact with these emails. Instead, delete them as soon as possible.

#### Security breach?

Data privacy policies and procedures are designed to protect personal data from accidental loss or disclosure. A data security breach happens when there's any unauthorized access to or disclosure of personal data held by Rotary or our participants. Breaches can include unauthorized sharing with a third party (by accident or by design), an attack on a computer network that results in exposed data, and more.

If Rotary International or The Rotary Foundation has shared personal data with you so you can perform your club or district role, <u>and you suspect or discover a breach, i</u>mmediately:

- Write to <u>privacy@rotary.org</u>
- Write to and/or contact your Rotary staff contact who provided the data.

Data Destruction: Shred, Permanently delete email records, deleted personal data

from your electronic devices



## **Questions?**





# DACdb Member's Data Budgeting/P&L

| Discussion |  |
|------------|--|
|            |  |

- Does your club use DACdb? If not, what do you use?
- How does your club currently maintain accurate membership records?
- How is the Board updated on Financial Items?
- How are Club Members updated on Financial Items?
- Does your club participate in the grant processes (District, Global)?
- DACdb (District and Club Database) is used by most clubs in the US as an interface to Rotary International.
- Discuss what tools if any other than DACdb that class participants may encounter.
- 3. <u>https://learn.rotary.org/members/pages/36/course-catalogs</u>
- 4. <u>https://www.dacdb.com/SecLogin3.cfm</u>

| Member Info   |
|---|
| Secretary: ensure that club member data is current and accurate                 |
| Treasurer: Ensure that bills, and other financial obligations are paid on time. |
| Rotary Recognizes two types of members:   |
| Active Club Members – pays dues, may vote                                       |
| Honorary Members – no dues, may not vote  |
|   |

To report member data through My Rotary, make sure you are signed in to your account. For detailed instructions, refer to the how-to guided subtrational athatethe second ary maintain accurate member data.

That drives so much information for the Club, the district and Rotary International

- 2. It is critical that the treasurer collect and pay dues to RI and the district on time. Failure to do so may lead to the club charter being revoked.
- 3. Active members are billed dues.
- 4. Honorary members are not billed dues.

| Budgeting                           |
|-------------------------------------|
| Annual Budget Process               |
| President/Board develop             |
| Share with members                  |
| Follow By Laws                      |
| Monthly P&L review                  |
| Provide update to Board             |
| Review for expenses vs income       |
| Identify unpaid dues, invoices, etc |

Each club should have an annual budget process described in By-Laws and Process/Procedure documents As president elect, work with current president to develop an annual budget Review with current and incoming board Share with club members for feedback (vote as appropriate based on By Laws)

Treasurer so provide a monthly P&L and Expense update to the board Present expenses relative to budget Provide updates on Bank Balances

- Note club should have two bank accounts:
  - General Expenses
  - Project Funds
    - Note District Grants require Clubs to fund the entire project up front and then seek reimbursement for approved amounts from the District after project completion

Identify any areas of concern

- Unpaid dues
- Outstanding invoices
- RI and District invoices due

## Tools

My Rotary



- Brand Center
- Rotary Showcase
- Learning Center

DACdb

#### My Rotary:

- Find resources related to your role.
- See your club snapshot and reports.
- Perform administrative tasks:
  - Add officers.
  - Pay club invoices.
  - Generate Foundation and membership reports.
  - Submit nominations for awards.
  - Get club forms.
  - Manage membership leads.

#### **Rotary Club Central**

- Enter club goals and achievements in membership, public image, service, Foundation giving, and young leaders.
- Review and adjust goals.
- View trends and reports.

#### Brand Center

- Learn how to use the Rotary brand.
- Customize event materials.
- Download Rotary logos, images, and videos.
- Create a club logo and stationery.
- Find templates for business cards, campaign ads, newsletters, and flyers.

#### **Rotary Showcase**

- Share photos and videos from successful projects.
- Research projects and partners.
- Describe how projects contribute to Rotary's global impact.

#### Learning Center

- Find training by role or topic.
- Find club officer courses and resources.
- Take courses on topics that interest you, at your own pace.

| ACdb – Lo   | gin Pag  | <b>Je</b> (DACdb.com)   |
|---|--|---|
| Don't miss these stories below.   |  | FORGOT USER NAME  |
| Navigating DACdb Quick Start<br>Guide   |  | Enter your E-mail address and click the 'Send Username' button<br>to receive an email with your User name.<br>Please look for an email to arrive in your inbox from   |
| START HERE  | 🕿 Email/Login Name   | maliservice@dacdb.com. If you do not see it, piease look in<br>your Spami, Junk folder. It should arrive within 5 minutes of<br>completing this screen. If you do not receive the email, places<br>contact our support team at 835-322-3248 ((all free) or ++720-   |
| Let's Get You That Cheat Sheet!   |  | 504-7300. Thank you.<br>login name  |
| When you're logged into DACdb, click on the "Support /<br>Learning" tab at the top of the window and then in the left<br>side menu click on "Overview" and select "DACdb_UI           | Remember Me: D DO NOT check his on public<br>systems (e.g., libraries, internet cafes) | Cancel Send Username<br>RESET PASSWORD  |
| <u>Quickstort Guide</u> <sup>*</sup> and you can download a PDF file that will<br>get you started with where things are in DACdb. This is a<br>great tool for less experienced users. | Forgot/Reset<br>Password? Username? ezLink 🕃   | Enter your login name and click the RESET PASSWORD' button to<br>receive an email with a link to reset your password.   |
| Please let us know if you have any questions.   |  | Plause look for an email from moliser/ice@blackt.com. If you<br>do not see it. plaose look in yours Span/Junk folder. It should<br>arrive within 5 minutes of completing this screen. If you do not<br>receive the email, places contact your alub secretary for<br>assistance. If your club socretary connot resolve the lissue. |
| ٢   | Securitymetrics"<br>Credit Card Safe   | please contact our support team at 833-322-3248 (toil free) or<br>+1-720-504-7300. Thank you.<br>login name   |
| Scroll to see the stories.  | J  | Cancel Reset Password   |

This is the home page for DACdb. <u>www.dacdb.com</u>

If you forget your user name or password, click the appropriate boxes

| DAC   | Cdb                     | - C                | lub  | Hor         | ne                  | Pag                           | e                                  |
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| Home Find My  | y DATA My CLUB DISTRICT | Support / Learning |  |             | Rotary Club of Bart | ram Trail-Julington Creek 🛛 📜 | ? 🛕 🥻 Williams, Gary               |
| MY CLUB NAVIGATION  | BARTRAM TRAIL-JULI      | INGTON CREEK CLUB  | FUNCTIONS (#63715)   |             |                     | Search for                    | Q 🖨 🕸 🛤 🖸                          |
| My Club Members       Member Cards  |                         |                    | oping. <b>Remove/Add</b> ICONs usi<br><b>cuts menu</b> in the same order a |             |                     |                               |                                    |
| Member DiRectory     Olub Leadership History     Avew Member Form     Admin Functions     Admin Functions | Club ezStory            | PMail              | Calendar   | Members     | PText               | Club Committees               | <b>Burletins</b><br>Club Bulletins |
| මදී Club Setup<br>⑦ Help Functions <  | Area                    | Assignments        | Find Member  | Information | eMeeting            | Engagement<br>(w/ Attendance) | Bulletin<br>Club ezBulletins       |
|   | Club Finance            | Grants             | Club Maps  | Reports     | RI Club<br>Compare  | RLI                           | Sponsors<br>Club Sponsors          |
| _   | Club Statistics         | Club Websites      |  |             |                     |                               |                                    |

This is the "MY CLUB" page. It may look different for you – the tiles can be arranged to meet your needs.

Choose the Members tile to get a list of your club members. (Next slide)

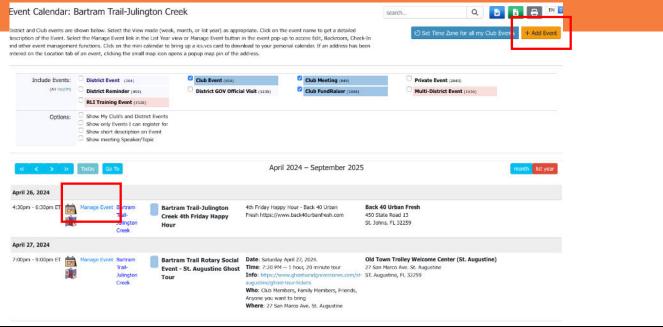
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| Home Find My DA  | IA My CLU             | B DISTRICT  | Support / Learning  |                                 |                                      |                | Rowry ch     | o or sardain trai.         | Soongoon creek 📷 🕂 🌘 mon                                |
| MY CLUB NAVIGATION   | # •                   | Action      | Member Name   | <ul> <li>Member Type</li> </ul> | Club Position                        | + Home Phone + | Office Phone | Cell Phone \$              | E-mail:   |
| My Club Members <  | 1 2                   | 2 < 0 2 1   | Andreoni, Michael 🛍   | Active                          |                                      | 904-654-5602   |              | 904-654-5602               | mike5550#comcasturet                                    |
| ≡ Member Cards   | 2 2                   | 2 K 🛛 🖬 J   | Berger, Raymond 🖸   | Active                          | Secretary                            | 901-312-5663   | 904-731-0418 | 901-866-0757               | rkberger3@yahoo.com                                     |
| E Club Information   | 3 8                   | 2 X 🛛 🖬 🛛   | Blankenagel, Hannah   | Honorary                        |                                      |                |              |                            | nannahbsophie@icloucl.com                               |
|  | 4 6                   | 1 K 🛛 🖬 🛛   |   | Active                          |                                      |                |              | \$04-370-4835              | scottbtech@gmail.com                                    |
| ≡ My Club Committees   | 5 E                   | 2 K 🛛 🖬 🛛   | Carnley, Joe 💼  | Active                          |                                      | 904-230-3084   | 904-632-2839 | 904-936-8576               | joc.camley@gmail.com                                    |
| Club Leadership History  | 6 6                   | 2 K 0 1 1   | Chambers, Joseph Andrew   | Active                          |                                      | 9044837933     | 9044837933   | 9044837933                 | andy@josephandrewhomes.com                              |
| Club Statistics  | 7 2                   | < < 0 201   |   | Honorary                        |                                      |                | 904-547-7300 | 904-759-7829               | Kevin.Davenport@stjohns.k12.fl.us                       |
| D Club Member Map  | 8 2                   | 2 K D M J   |   | Active                          |                                      | 904-615-6620   | 904-615-6620 | 904-716-4822               | ch.douglas4@gmail.com                                   |
|  | 9 8                   | 2K0ml       | Gavarrette, Jose 🛍  | Active                          | Past President                       |                |              | 407-376-1177               | jose.gavarrette3/gmail.com                              |
| Gub Badge Numbers  | 10 2                  | 2 K D SH    | Goldman, David 💼  | Active                          | President                            |                |              | 901-871-3655               | davidglcmn1@gmail.com                                   |
| ■ RJ Integration <   | ii E                  | ZKOMI       | Grahowski, Inez   | Active                          |                                      |                |              | 312-420-4131               | cigrabowski@me.com                                      |
| 3* NewMember Form  | 12 0                  | 2 K D SH J  | - A Contraction of the second   | Active                          | Public Image Chair                   | 919-475-7450   |              | 919-475-7450               | damel.gnffin)#gmail.com                                 |
| E Admin Functions  | 13 E<br>14 E          | 2 C U I     | Grindstaff, Terry<br>Gwaltney, Joseph Franklin Jr. 🖨  | Active                          | Treasurer                            | 904-287-3160   | 904-737-7220 | 703-919-6810               | tgrinders@aol.com<br>Cowaltnev@yahoo.com                |
| 8 Setup  | 14 0                  |             | a subscription of the second se | Active                          | Treasurer                            | (863) 409-1192 | 904-737-7228 | 904-803-9850<br>8634091192 |   |
| - Constant   | 15 16                 | 2 COALS     |   | Active                          |                                      | 9046576789     | 9043014844   | 904-657-6789               | deanhrotary#gmail.com<br>amy.huffi@uss.salvationamw.org |
| ? Help Functions <   | 17 0                  | 2 2 1 2 2 3 |   | Active                          |                                      | 9040570789     | 904665-6765  | 9044000192                 | timothynun(1967@umail.com                               |
| My CLUB Shortcuts  | 18 2                  | // 051      |   | Active                          |                                      |                | 304000-0700  | 904-903-1125               | człocketti? gmal.com                                    |
| 00000000   | 19 8                  | 2 × 0 × 1   | and the second  | Active                          |                                      |                | 904-503-7547 | 904-465-7214               | bradtjohnson@gmail.com                                  |
| DISTRICT Shortcuts   | and the second second | 2 2 0 5 1   | Kaltes Alan H 🛱   | Active                          |                                      |                |              | 904-673-5565               | al##kaltermail.com                                      |
| NAMES OF A DESCRIPTION OF A | 21 0                  | / 0 51      |   | Active                          |                                      |                | 424-039-2912 | 904-316-9315               | kkessler/fikesslercreative.com                          |
| e Q 🎎 🖿 🐨 🜌  | 22                    | 2 1 1 1 1   |   | Active                          |                                      |                |              | 904-316-0175               | Eleipses@gmail.com                                      |
|  | 23 6                  | 10000       | A CALLER OF CONTRACTOR OF C   | Active                          |                                      |                | 904-535-8411 | 904-535-8411               | pmackey81@gmail.com                                     |
|  | 24                    | / Carl      |   | Active                          |                                      | 90428751.48    | 904-343-3657 | 904-3433657                | Lance Maicolm@ContractorConnection.com                  |
|  | 25 8                  | 2 × 0 × 1   |   | Active                          |                                      | 3038057660     |              | 3038087650                 | gregomanson/Qgmail.com                                  |
|  | 25 0                  | 11000       |   | Active                          |                                      | 9046715275     |              | 9046715275                 | Balley/RoundTableRealty.com                             |
|  | 27 E                  | 2XDAL       | Mitchell, Jason William 🙆   | Active                          |                                      | 904-217-7188   | 904-954-8105 | 904-495-8250               | jwmitch33@gmail.com                                     |
|  | 28 C                  | 11000       | Mosher, Holie   | Active                          |                                      |                | 904-451-0841 | \$04-451-0041              | nkmosher)#gmail.com                                     |
|  | 29 2                  | 2KO SH      | Moyers, Cassandra Ann 💼   | Active                          | Past President                       | 801-870-09-10  |              | 8018700910                 | moyorsk1@gmail.com                                      |
|  | 30 <b>E</b>           | 2×0813      | Munay, Jack 💼   | Active                          | Club Director<br>Executive Secretary | 904-382-6008   | 904-382-6008 | 904-382-6008               | JackBm@aol.com  |
|  | 31 2                  | 2×0=1       | Paston, Molly 🖨   | Active                          | President-Elect<br>Fundraiser Chair  |                |              | 904-679-1535               | mqpaxton75@gmail.com                                    |
|  | 32 E                  | 2KOM1       | Rhodes, Tommy 🙆   | Active                          |                                      |                | 9046434679   | 9046579222                 | Tommy thodes@Brightway.com                              |
|  | 33 8                  | 1 C 1 3 - 1 | Ross. Nitchell Theodore 🙆   | Active                          | Rotary Foundation Chair              |                |              | 303-905-4644               | mitcheliross70@gmail.com                                |

This is the list of your members. You can click on the pencil to edit a member

## DACdb – Member Updates

| nter Makeup                          | otary District: 6970            |                                     |               |                    | 1                |             |
|--------------------------------------|---------------------------------|-------------------------------------|---------------|--------------------|------------------|-------------|
| nance Cente                          |                                 |                                     |               |                    | Terminate Member | Cancel Save |
| ub Members                           | Member Photo Contact Club       | Login Business Partner/Spouse Bio P | Data Log Zone | RLT                | 1.0              |             |
| ly Engageme <mark>t/Attendanc</mark> | terreter Manade Economic France |                                     |               |                    |                  |             |
| ly Finance Statement                 | Member Information              |                                     |               | Other Information  |                  |             |
| y Rotary                             |                                 |                                     | 982           |                    |                  | 1957        |
| ow to Adjust Profile                 | Account/District:*              | 6970                                |               | Club Start Date: 0 | 08/05/2015       |             |
| ow to Set Required Fields            | Club:*                          | Bertram Trail-Julington Creek 😽     |               | Birth Date: 0      | 15 3 JUN 3 1960  |             |
| ow to Set Privacy Settings           | Rotary ID:                      | 9347581                             |               |                    | DAY MONTH YEAR   |             |
| LUB Shortcuts                        | Member Type:*                   | Active                              |               | Birth Place: 0     |                  | 0           |
|                                      | Prefix:                         | (Seriect)                           |               | Sponsor Name (1):  | Scott Burgess    | 0           |
| SC 🗟 🗿 🜌                             | First Name:*                    | Gary                                |               | Sponsor Name (2):  |                  |             |
| RICT Shortcuts                       | Middle Name:                    |                                     | 0             |                    |                  |             |
| 0                                    | Last Name:*                     | Willams                             |               |                    |                  |             |
|                                      | Suffix:                         |                                     |               |                    |                  |             |
|                                      | Gender:                         | Male 😂                              |               |                    |                  |             |
|                                      |                                 |                                     |               |                    |                  |             |
|                                      |                                 |                                     |               |                    |                  |             |
|                                      | Badge Information               |                                     |               |                    |                  |             |
|                                      |                                 |                                     | PRV           |                    |                  |             |
|                                      | Badge/Nick Name: 0              | Gary                                |               |                    |                  |             |
|                                      | Badge Number:                   | Gary                                |               |                    |                  |             |
|                                      |                                 |                                     |               |                    |                  |             |
|                                      | Badge Title: 🕲                  |                                     |               |                    |                  |             |

## DACdb - Calendar

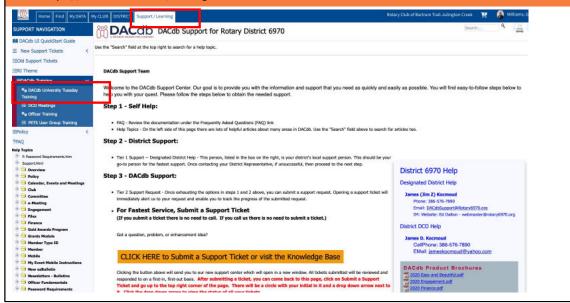


## DACdb – Club Finance

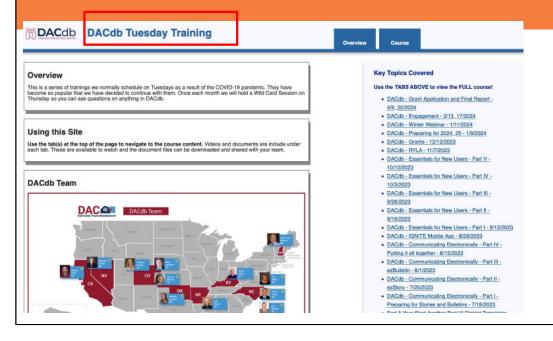
| INANCE NAVIGATION F           | Finan         | ce Module 16-716   |   |                  |                        |                              |                                      |                     | 6  |                         |  |  |
|-------------------------------|---------------|--|---|------------------|------------------------|------------------------------|--------------------------------------|---------------------|--|-------------------------|--|--|
| ) Financial Summary           |               |  |   |                  |                        |                              |                                      |                     | -  |                         |  |  |
| Invoices                      |               | we a valid subscription, refer this docur  |   |                  |                        |                              |                                      |                     |  |                         |  |  |
| 2 Accounting                  |               | note, the finance module is not a location to pay your invoice (individual member or district dues). You can pay<br>gr-line using the link provided to you or by going to the My Delta > My Finance Stationent page. |   |                  |                        |                              |                                      |                     |  |                         |  |  |
| Statements                    |               | and the second second second   |   |                  |                        |                              |                                      |                     |  |                         |  |  |
| Print Checks                  |               | ould like to add an additional subscripti<br>elect an account below and use the hyp  |   |                  |                        |                              |                                      | in honorlink        |  |                         |  |  |
| Bank Reconcile                |               |  | errories in the released and adding the | is is managed in | ances, pocular         | nonent pris soppart conter   | to one reason of the rec             | dy ridden in se     |  |                         |  |  |
| Budget                        | inanc         | e Subscriptions  |   |                  |                        |                              |                                      |                     |  | Contraction Contraction |  |  |
|                               | #             | Action Account Name  | Share and share and                     | Account #        | Owner                  | and a second second second   | Date                                 | Jpened              | Opened By  | Not                     |  |  |
| E Reports                     | Club I        |  |   |                  |                        |                              |                                      |                     |  |                         |  |  |
| Vendors                       | i 🔘           | 🖉 🛠 Bartram Trail-Julington (  | 716                                     | Bartrano Tiz     | ni-Julington Creek     | 05-5                         | ep-17                                | Brandt, Heather Lee | New  |                         |  |  |
| Year End                      | in the second | with a second have   |   |                  |                        |                              |                                      |                     |  |                         |  |  |
| Chart of Accounts             | JSEIS         | with access to:  | and a station of the second second      |                  | Charles and the second |                              | STATISTICS IN COMPANY                | and the second      | and the second | and the second second   |  |  |
| Finance Setup                 | Read<br>Cely  | Member Name  | Home Phone                              | Office           | Phone.                 | Cell Phone                   | Email                                |                     | Access Granted   | Ву                      |  |  |
| teda Functions                |               | Mackey, Jamie  |   | 904-5            | 5-8411                 | 904-535-8411                 | jpmackey81@gma                       |                     | Johnson, Brad T.   |                         |  |  |
| Finance Help                  |               | Gwaltney, Joseph Franklin Jr.  |   |                  |                        | 904-803-9850                 | f.gwaitney@yahoo                     |                     | Johnson, Brad T.   |                         |  |  |
|                               |               | Burgess, Scott   |   | 004.84           | 3-7547                 | 904-370-4836<br>904-465-7214 | scottblechögmail.<br>bradtiohnsonRom |                     | Johnson, Brad T.<br>Kelly, Lin A.  |                         |  |  |
|                               |               | Johnson, Brad T.<br>Goldman, David   |   | 904-34           | 37397                  | 904 405 7214<br>904 874 3655 | davideidmn1@gra                      |                     | Johnson, Brad T.   |                         |  |  |
|                               |               |  |   |                  |                        | 904-679-1535                 | incpaston/%@gma                      |                     | Jolinson, Brad T.  |                         |  |  |
| • Utility                     | 0             |  |   |                  |                        |                              |                                      |                     |  |                         |  |  |
| 9 Utility<br>y CLUB Shortcuts |               | Paxton, Molty  |   |                  |                        |                              |                                      |                     |  |                         |  |  |
| • Utility                     |               | Paston, Mony   |   |                  |                        |                              |                                      |                     |  |                         |  |  |

#### DACdb - Support

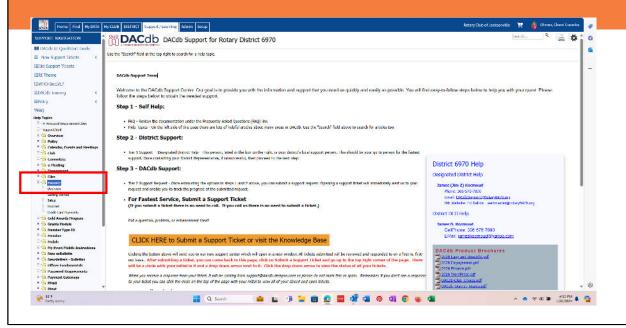
https://www.dacdb.com/SecLogin3.cfm?fw=Home&



### DACdb - Support



#### DACdb - Support



# **Case Study**

- Your club has not been updating its membership list during the past year, and the information in My Rotary is not accurate. Your last invoice shows that the club is still paying RI dues for some former members.
  - How can you make sure this doesn't happen again?
  - What process could you develop to update membership information regularly and in a timely manner?
  - What can you review to identify former members?
- Ensure membership is updated at least monthly.
- Coordinate with membership chair for new member inclusion.
- Review Treasurer's reports for unpaid dues
- Schedule regular membership reviews Board meetings?
   Quarterly Secretary/Treasurer's report?
- Review member list in DACdb

# **Case Study**

Your expenses are exceeding your income.

- What tools do you have to determine causes?
- What factors should you be looking at to determine why?



# **Questions?**





# Club Records Attendance Dues Payment Management

| Records   |
|---|
| <ul> <li>Your club may have materials that it should retain, including:</li> <li>Financial records – billing, bank statements, Income/P&amp;L statements</li> <li>Club application for membership in Rotary</li> <li>List of charter members</li> <li>Changes to the club's name or meeting place</li> <li>Club constitution and bylaws with amendments</li> <li>Meeting notices and minutes</li> <li>News stories, photos, slides, or videos about the club, its projects, and its activities</li> </ul> |
|   |

Ask the previous secretary for your club's files, office supplies, and equipment. Ask previous Treasurer for bank statements, budget, P&L and Income statements.

Where are records retained? Who has access? Are passwords required?

# Discussion How does your club maintain accurate Club Records? Why are accurate club records important?

- 1. Generate Discussion could be online, could be paper
- 2. Inaccurate records may impact:
  - Dues payable to RI and the district.
  - Mailing, email or phone calling to members
  - Lack of information for Board financial analysis
  - Member activity
  - Member attendance to district events (RLI, Membership Summit, District Training/Assembly)
  - Service event participation, Club Projects
  - Others.....

## Attendance



- Secretary responsibility is to ensure that club member attendance is tracked per club by laws and procedures
- How does your club do this today?
- Does your club track for meetings only? Social Events? Service Projects?

# DACdb - Engagement



| Home Find My  | DATA My CLUB DISTRICT Su                                       | ipport / Learning                |          |                     |                                  | Rotary C    | lub of Bartram Trail-Julington Cr | eek 🟋 🚳 Will                     | lams, Gary |
|---|--|----------------------------------|----------|---------------------|----------------------------------|-------------|-----------------------------------|----------------------------------|------------|
| ENGAGEMENT NAVIGATION   | Engagement Summ  | nary: Bartram                    | Trail-Ju | lington Creek       | OrgYear: 2023-24 \$              |             | View                              | Club View 🚺 🔒                    | \$         |
| Engagement Summary  | The Engagement Dashboard is s<br>The summary below defaults to |                                  |          |                     |                                  |             |                                   |                                  | 401SA      |
| <ul> <li>Manage Meetings</li> <li>Constants of the Mark Annual Constants</li> </ul> | 101 hours<br>Total Volunteer Hours 202                         |                                  | 27 Pe    | ople                | \$ 0<br>Total Cash Contri        | butions 202 | 3-24 <b>\$ 0</b><br>Total In-1    | (ind Contributions 202           | 3-24       |
| View District Attendance     Submit Attendance     Excused Attendance               | 0 Users  |                                  |          |                     |                                  |             |                                   |                                  |            |
| Makeups   | 8  |                                  |          |                     |                                  |             |                                   |                                  |            |
| <ul> <li>Enter Makeup</li> <li>Enter Banked Makeup</li> </ul>                       | Top Hours 2023-24  | ł                                | -        | Top Members 2       | 023-24                           | _           | S Top Contributions               | 2023-24                          | 1          |
| Manage Banked Makeups   | Service Project Name   | Project Club                     | Hours    | Member Name         | Project Club                     | Hours       | Service Project Name              | Project Club                     | Amount     |
| Match Banked MakeUps  | Fundraising - Brinner  | Bartram Trail-Julington<br>Creek | 26       | Paxton, Molly       | Bartram Trail-Julington<br>Creek | 12          | Racetrack Roadside Cleanup        | Bartram Trail-Julington<br>Creek | 0          |
| Service Projects  | Alzheimer's Walk   | Bartram Trail-Julington<br>Greek | 18       | Berger, Raymond     | Bartram Trail-Julington<br>Creek | 11          | Ball Ringers - Salvation Army     | Bartram Trail-Julington<br>Greek | 0          |
| 注王 Manage Projects  | Racetrack Roadside Cleanup                                     | Bartram Trail-Julington<br>Creek | 15       | Hoover, Lewis Dean  | Bartram Trail-Julington<br>Creek | 8           | Rethreaded                        | Bertram Trail-Julington<br>Creek | 0          |
| I≣ Enter Project Activity   | Rethreaded   | Bartram Trail-Julington<br>Greek | 12       | Gavarrette, Jose    | Bartram Trail-Julington<br>Creek | 7           | St Johns Food Pantry              | Bartram Trail-Julington<br>Oreek | 0          |
| Reports   | Bell Ringers - Salvation Army                                  | Bartram Trail-Julington<br>Creek | 11       | Kalter, Alan H      | Bartram Trail-Julington<br>Creek | 7           | Fundraising - Brinner             | Bartram Trail-Julington<br>Creek | 0          |
| Bar Codes   | Rapetrack Roadside Cleanup                                     | Bartram Trail-Julington<br>Greek | 11       | Goldman, David      | Bartram Trail-Julington<br>Creek | 7           | Alzheimer's Walk                  | Bartram Trail-Julington<br>Greek | 0          |
| 🕑 Help  | St Johns Food Pantry   | Bartram Trail-Julington<br>Creek | 8        | Johnson, Brad T.    | Bartram Trail-Julington<br>Creek | 4           | Racetrack Roadside Cleanup        | Bartram Trail-Julington<br>Creek | 0          |
| Admin Functions K   | To   | p 7 Service Project Hou          | irs: 101 | Rhodes, Tommy       | Bartram Trail-Julington<br>Creek | 4           | 1                                 | Top 7 Service Project A          | mount: 0   |
| My CLUB Shortcuts   |  |                                  |          | Rowland, Parker     | Bartram Trail-Julington<br>Creek | 4           |                                   |                                  |            |
|   |  |                                  |          | Shine, James M. Jr. | Bartram Trail-Julington<br>Creek | 4           | Soal 2023-24                      |                                  | -          |
| DISTRICT Shortcuts  |  |                                  |          |                     | Top 10 Service Project Ho        | urs: 65     | Engage                            | ement Goals                      | =          |

#### DACdb - Attendance Engagement (w/ Attendance) Rotary Club of Bartram Trail-Julington Creek 📴 🧥 Williams, Gary DACdb Home Find My DATA My CLUB DISTRICT Support / Learning ENGAGEMENT NAVIGATION Engagement: Club Meeting Listing 🖹 🔒 🕸 Engagement Summary Club Meetin Open Engagements are shown below. The engagements listed include your club, shared club projects and District sponsored projects. 🛱 Manage Meetings Selit Monthly Attendance Click on the RADIO BUTTON to enter attendance Click on the Meeting Name to see a summary of club meeting. 2 View District Attendance Le Submit Attendance Parameters: Level Attendance Club Meeting Status: Open Meetings - Attendance Can be Entered Attendance Submitted (Meeting Closed) 🔹 Enter Makeup OPEN - Engagements: Club Meeting Listing # Action Engagement Name 2023-24 Enter Banked Makeup Attended Guests Start Date Actual Hours Created Anage Banked Makeups January 2024 Paxton, Moll Address Match Banked MakeUps 1 🔿 🖉 🗶 🔝 📷 D6970 Membership Summit 1 0 Jan 27, 2024 0.0 01/22/2024 07:57 Service Projects 2 2 2 A mail Social Event - Icemen Game 3 2 X A mail Social - 2nd Bay 2nd Tue HH Berger, Raymond Jan 13, 2024 0.0 6 0 01/23/2024 05:05 A ₹≣ Manage Projects Berger, Raymond 01/23/2024 05:03 / 7 Jan 09, 2024 0 0.0 Set a state of the set of the December 2023

### DACdb - Attendance

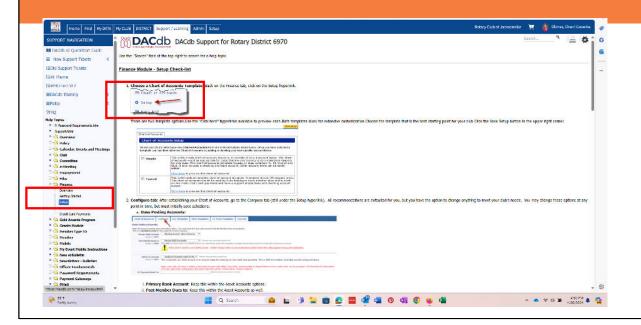


| AGEMENT NAVIGATION      | Bartram Trail-Juli                         | naton Creek          | - Social Event -            | Icemen 6          | ame Mago         | 3744       |            | Sea  | rah 📇 🏘  |                                 |  |
|-------------------------|--|----------------------|-----------------------------|-------------------|------------------|------------|------------|--|--|---------------------------------|--|
| Engagement Summary      | Saturday January 13,                       | 2024                 |                             |                   |                  |            |            |  | - *  |                                 |  |
| b Meetings              | This page is a summary of meeting          | g engagement. Member | data can be added using the | ADD button, or co | mected using the | penol dit. | Inc. Inc.  | efresh Add to Cal  | 6.143 M  |                                 |  |
| lanage Meetings         |  |                      |                             |                   |                  | 2000/2010  | Cancel R   | erresh Add to Car  | audar.   |                                 |  |
| dit Monthly Attendance  |  |                      |                             |                   |                  |            | Add Member |  |  |                                 |  |
| lew District Attendance |  |                      |                             |                   |                  |            |            |  |  |                                 |  |
| ndance Entry            | 37   | 0_0                  | 0                           |                   |                  | 0          | 0          | 6/0-   | 16.2%  |                                 |  |
| ttendance Entry         | Club Size (Active Members)                 | and of the           | Makeups Filed               |                   | # Excused        | Attending  |            | # Active / # Exemp   | and the second |                                 |  |
| ar-code Entry           |  |                      |                             |                   | Bullestaarda     |            |            | Contraction of the local division of the loc |  |                                 |  |
| atch Bar-code Entry     | Club Meeting Attendance List               |                      |                             |                   |                  |            |            |  |  |                                 |  |
| ubmit Attendance        | # Action MemberName                        | # MemberType         | Makeup ÷                    | Excused \$        | Exempt +         | Hours \$   | Meal Code  | ngagement Detail id  |  |                                 |  |
| xcused Attendance       | 1 🖉 🗶 Burgess, Scott                       | Active               |                             |                   |                  | 1.00       |            |  |  |                                 |  |
| eeps                    | 2 🖉 🗶 Johnson, Brad T.                     | Active               |                             |                   |                  | 1.00       | · · · · ·  | Member Name:   | Select one   | 0                               |  |
| nter Makeup             | 3 Z X Kaiter, Alan H<br>4 Z X Murray, Jack | Active<br>Active     |                             |                   |                  | 1.00       |            | Member Type:   | Active 🔁   |                                 |  |
| nter Banked Makeup      | 5 2 X Paxton, Molly                        | Active               |                             |                   |                  | 1.00       |            | Meeting Hours:   | 1.00 Default: 1.0  | iours/meeting                   |  |
| Nanage Banked Makeups   | 6 Z 🗶 Smith, Steven C                      | Active               |                             |                   |                  | 1.00       |            | Makeup:  | Check If this is a Makeup  | Meeting                         |  |
| latch Banked MakeUps    |  | Active: 6            | 0 Makeups                   | 0 Excused         | 0 Exempts        | 6.00 Hrs   |            | Excused:   | Check if member is excu  | sed from attending this meeting |  |
| nce Projects            | 100 C Rows                                 |                      |                             |                   |                  |            |            | Exempt:  | Check if member is Exer  | npt (e.g., Rule of 85)          |  |
| nce projects            |  |                      |                             |                   |                  |            |            | Meal Code:   | Select one   |                                 |  |
|                         |  |                      |                             |                   |                  |            |            | Guest Code:  | R  | \$290 <sup>72</sup>             |  |
|                         |  |                      |                             |                   |                  |            |            | Amount   | 0.00   |                                 |  |
|                         |  |                      |                             |                   |                  |            |            | Notes:   |  |                                 |  |
|                         |  |                      |                             |                   |                  |            |            |  |  |                                 |  |

# Attendance - Training

|  | 60 S  |
|--|---|
| m DACdb Tuesday Training   | Course Course   |
| Overview<br>This is a series of trainings we normally schedule on Tuesdays as a result of the COVID-19 pandemic. They have<br>become so popular that we have decided to continue with them. Once each month we will hold a Wild Card Session on<br>Thursday so you can ask questions on anything in DACdb. | Key Topics Covered<br>Use the TABS ABOVE to view the FULL course!<br>• DACdb - Grant Application and Final Report -<br>4/9_20/2024  |
| Using this Site<br>Use the tab(s) at the top of the page to navigate to the course content. Videos and documents are include under<br>each tab. These are available to watch and the document files can be downloaded and shared with your team.   | <ul> <li>DACdb - Engagement - 2/13_17/2024</li> <li>DACdb - Winter Webinar - 1/11/2024</li> <li>DACdb - Preparing for 2024_25 - 1/9/2024</li> <li>DACdb - Grants - 12/12/2023</li> <li>DACdb - RYLA - 11/7/2023</li> <li>DACdb - Essentials for New Users - Part V -</li> </ul> |
| DACdb Team DACdb Team DACdb Team   | 10/10/2023<br>DACdb - Essentials for New Users - Part IV -<br>10/3/2023<br>DACdb - Essentials for New Users - Part III -<br>9/26/2023<br>DACdb - Essentials for New Users - Part II -   |
|  | <ul> <li>Engagement Part I - 5/4/2021</li> <li>Engagement Part II - 5/11/2021</li> </ul>  |

#### Fianance – Training



# Finance – Training

| SUPPORT NAVIGATION                               | DACdb DACd  | Support for Ro   | tary District 69                     | 970   |                              |  | Search., | 8 | A 1 |
|--|---|--|--------------------------------------|---|------------------------------|--|----------|---|-----|
| DACdb UI OuickStart Guide                        | UPU a MEMBER MINISTER FRO COMPANY   |  |                                      |   |                              |  |          |   |     |
| New Support Tickets                              | Use the "Search" field at the top right to se   | sich for a help topic.   |                                      |   |                              |  |          |   |     |
| EOId Support Tickets                             | Finance Module - Generating Invoid  |  |                                      |   |                              |  |          |   |     |
| TERI Theme                                       |   | 100 AUX 200 A  |                                      |   |                              |  |          |   |     |
| TEWHO-SectVL?                                    | 1. Begin in the Invoices hyperlink:   | Found in the left menu col   | amn under the Finance                | tab.  |                              |  |          |   |     |
|  | a Financial Summary   |  |                                      |   |                              |  |          |   |     |
| EDACdb Training                                  | 2 Invoices  |  |                                      |   |                              |  |          |   |     |
| ■Policy  | A Real Provide Street Street Street   |  |                                      |   |                              |  |          |   |     |
| ?FAQ   | 2. Add an Invoice Group: An invoice   | group must be created and  | h hiling ords                        |   |                              |  |          |   |     |
| Help Tapics                                      | a. Click on the yellow 'Add Invoi   |  |                                      |   |                              |  |          |   |     |
| R Password Requirements.htm     Support.html     | Invoices: Warrenton   | (Club# 6128)   |                                      | Seath-  | W 25 -                       | 音音な  |          |   |     |
| Contraction                                      | and the second |  |                                      |   |                              | and the second se  |          |   |     |
| * 🖼 Policy                                       | The Invoice Group is the electronic<br>toxicies. Oracle Charge Items who  |  |                                      | eate an proce Group to contain th<br>n. Then click on the Involce Group t | to enable the                | investigen Greenigen   |          |   |     |
| 🖲 🔁 Calendar, Events and Meetings                | Member Tally, where you can select  | the members to bill and assoign o  | harges to they invoice.              |   |                              |  |          |   |     |
| 🗄 😂 Club   | Investice Groups Charge I   | And Address of the owner |                                      |   |                              |  |          |   |     |
| Committee  | And increased over 19 and   | of the second second second  | and A second                         | The Second Second   | and inclusion of the         | ACCOUNT OF A DECISION OF A DECISIONO O |          |   |     |
| * 😂 e-Heeting<br>* 🔁 Engagement                  | step #  |  | e Baler + Period                     | Omcription  | Date Posted +                |  |          |   |     |
| 1 Si Files                                       |   |  | 28,2816 102006-7                     | the are using DaCitb now?   |                              | \$2,015.00   |          |   |     |
| E Sinance  | <ul> <li>2 × 9 3W-32864</li> <li>2 × 9 3W-31827</li> </ul>  |  | r 36, 2018 92281.7                   |   | 3at 13, 2214                 | 8770.00  |          |   |     |
| Overview   | 0 2 4 9 300-31927   |  | 199, 2016 test<br>1.11, 2015 2nd atr | test<br>2nd Dues  | Apr 19, 2018<br>May 26, 2016 | \$2,099.50   |          |   |     |
| Getting Started                                  | and a second  | Pog 17, 2013 AU  | 1.11, 2015 2141 (92                  | 2011 0 0005   | may 25, 2010                 | \$1,000,00   |          |   |     |
| Setup  |   |  |                                      |   |                              |  |          |   |     |
| Instices   | 1. In the Invoice Group v   | indow that opens, fill in th   | a parameters for the inv             | aice group.   |                              |  |          |   |     |
| Credit Card Payments                             | Involce Group   |  |                                      |   |                              |  |          |   |     |
| * 🔄 Grants Module                                |   | 102115 (#.g., 1st Qtr. 1   | 01014 171                            |   |                              |  |          |   |     |
| 🗄 🔁 Member Type ID                               |   |  | denne-est.                           |   |                              |  |          |   |     |
| 🗄 🖼 Henber                                       |   | 87/84/2016   |                                      |   |                              |  |          |   |     |
| * 🗇 Mobile                                       |   | July - September 2016  |                                      |   |                              |  |          |   |     |
| Hy Event Mobile Instructions                     |   | 88/85/2016   |                                      |   |                              |  |          |   |     |
| # 19 New ezbulictin # 19 Newsletters - Bulletins | Envoice Message:  | The message antered below w<br>tile are using DACEs new!   | ill be included on each invol        | DE:   |                              |  |          |   |     |
| Officer Fundamentals                             |   |  |                                      |   |                              |  |          |   |     |
| * I Password Requirements                        |   |  |                                      |   |                              |  |          |   |     |
| 🗏 📴 Payment Gateways                             |   |  |                                      | -   |                              |  |          |   |     |
| 🗄 🔁 Pffeil                                       |   |  |                                      | Cancel Save   |                              |  |          |   |     |
| https://decolo.com/Help2/index.cfm#              | *   |  |                                      |   |                              |  |          |   |     |

| Dues Billing                                   |
|--|
| How does your club determine Dues?             |
| How does your club bill Dues?                  |
| How are members made aware of Dues components? |
| What system do you use for Dues?               |
| Are there variable Dues?                       |
|  |
|  |

- 1. Generate Discussion –
- 2. Generate Discussion
- 3. Generate Discussion
- 4. Normal?, Student?, Leave of Absence? Meals?

| Payment Management                            |
|---|
| How will bills be paid?                       |
| Who has authority to pay bills, write checks? |
| Who controls check stock?                     |
| Do you use online services (e.g. Venmo)?      |
|   |
|   |
|   |

- 1. Generate Discussion –
- 2. Generate Discussion
- 3. Generate Discussion
- 4. Normal?, Student?, Leave of Absence? Meals?



# **Questions?**

### What's Next?

# Wrapping Up

#### What's Next?

#### Think about these questions as you begin your role

- What are the main responsibilities of the Secretary or Treasurer in your club?
- How will you work with the club president?
- How will you ensure that you report incoming club officers on time?
- How will you track the notices you send and receive?
- How will you ensure accurate timely billing of dues and payment of expenses/invoices?
- How will your club manage its membership leads?
- What is one goal you'll work toward next year? How does this goal support your club's strategic plan?
- How will you ensure that your club reflects the entire community?
- Which administrative duties can you do more efficiently?

#### Club Secretary – What's Next?

# **QUESTIONS?**

