

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 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	Je (DACdb.com)
Don't miss these stories below.		FORGOT USER NAME
Navigating DACdb Quick Start Guide		Enter your E-mail address and click the 'Send Username' button to receive an email with your User name. 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 your Spami, Junk folder. It should arrive within 5 minutes of completing this screen. If you do not receive the email, places contact our support team at 835-322-3248 ((all free) or ++720-
Let's Get You That Cheat Sheet!		504-7300. Thank you. login name
When you're logged into DACdb, click on the "Support / Learning" tab at the top of the window and then in the left side menu click on "Overview" and select "DACdb_UI	Remember Me: D DO NOT check his on public systems (e.g., libraries, internet cafes)	Cancel Send Username RESET PASSWORD
<u>Quickstort Guide</u> [*] and you can download a PDF file that will get you started with where things are in DACdb. This is a great tool for less experienced users.	Forgot/Reset Password? Username? ezLink 🕃	Enter your login name and click the RESET PASSWORD' button to receive an email with a link to reset your password.
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٢	Securitymetrics" Credit Card Safe	please contact our support team at 833-322-3248 (toil free) or +1-720-504-7300. Thank you. 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

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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)

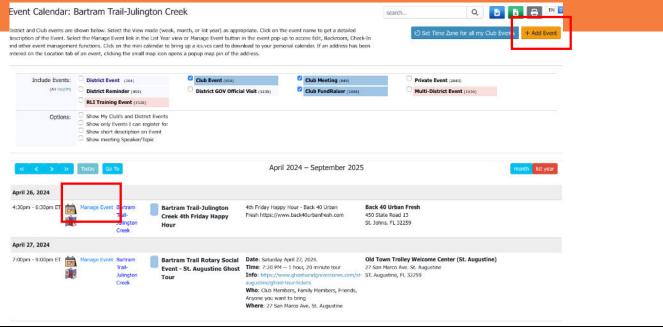
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D Club Member Map	8 2	2 K D M J		Active		904-615-6620	904-615-6620	904-716-4822	ch.douglas4@gmail.com
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	27 E	2XDAL	Mitchell, Jason William 🙆	Active		904-217-7188	904-954-8105	904-495-8250	jwmitch33@gmail.com
	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 E	2×0813	Munay, Jack 💼	Active	Club Director Executive Secretary	904-382-6008	904-382-6008	904-382-6008	JackBm@aol.com
	31 2	2×0=1	Paston, Molly 🖨	Active	President-Elect 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

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DACdb - Calendar

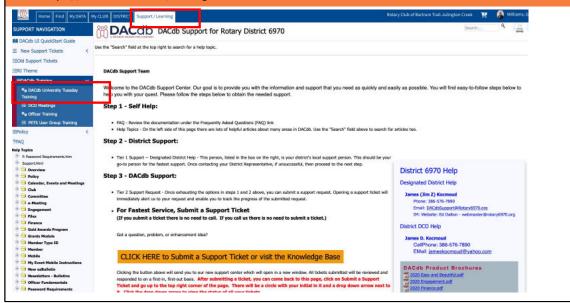


DACdb – Club Finance

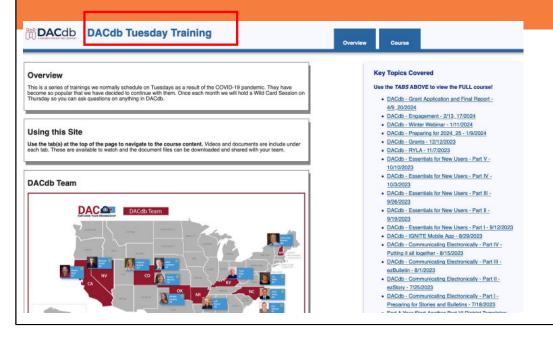
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teda Functions		Mackey, Jamie		904-5	5-8411	904-535-8411	jpmackey81@gma		Johnson, Brad T.			
Finance Help		Gwaltney, Joseph Franklin Jr.				904-803-9850	f.gwaitney@yahoo		Johnson, Brad T.			
		Burgess, Scott		004.84	3-7547	904-370-4836 904-465-7214	scottblechögmail. bradtiohnsonRom		Johnson, Brad T. Kelly, Lin A.			
		Johnson, Brad T. Goldman, David		904-34	37397	904 405 7214 904 874 3655	davideidmn1@gra		Johnson, Brad T.			
						904-679-1535	incpaston/%@gma		Jolinson, Brad T.			
• Utility	0											
9 Utility y CLUB Shortcuts		Paxton, Molty										
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DACdb - Support

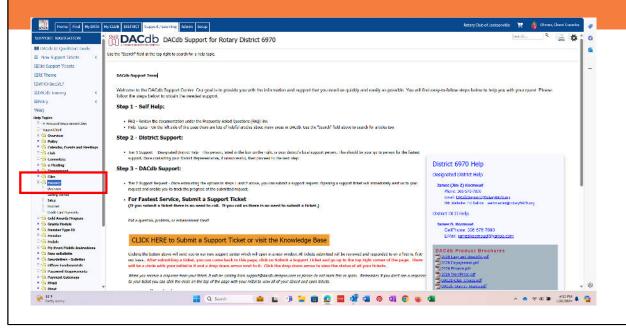
https://www.dacdb.com/SecLogin3.cfm?fw=Home&



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

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 The summary below defaults to								401SA
 Manage Meetings Constants of the Mark Annual Constants 	101 hours Total Volunteer Hours 202		27 Pe	ople	\$ 0 Total Cash Contri	butions 202	3-24 \$ 0 Total In-1	(ind Contributions 202	3-24
View District Attendance Submit Attendance Excused Attendance	0 Users								
Makeups	8								
 Enter Makeup Enter Banked Makeup 	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 Creek	26	Paxton, Molly	Bartram Trail-Julington Creek	12	Racetrack Roadside Cleanup	Bartram Trail-Julington Creek	0
Service Projects	Alzheimer's Walk	Bartram Trail-Julington Greek	18	Berger, Raymond	Bartram Trail-Julington Creek	11	Ball Ringers - Salvation Army	Bartram Trail-Julington Greek	0
注王 Manage Projects	Racetrack Roadside Cleanup	Bartram Trail-Julington Creek	15	Hoover, Lewis Dean	Bartram Trail-Julington Creek	8	Rethreaded	Bertram Trail-Julington Creek	0
I≣ Enter Project Activity	Rethreaded	Bartram Trail-Julington Greek	12	Gavarrette, Jose	Bartram Trail-Julington Creek	7	St Johns Food Pantry	Bartram Trail-Julington Oreek	0
Reports	Bell Ringers - Salvation Army	Bartram Trail-Julington Creek	11	Kalter, Alan H	Bartram Trail-Julington Creek	7	Fundraising - Brinner	Bartram Trail-Julington Creek	0
Bar Codes	Rapetrack Roadside Cleanup	Bartram Trail-Julington Greek	11	Goldman, David	Bartram Trail-Julington Creek	7	Alzheimer's Walk	Bartram Trail-Julington Greek	0
🕑 Help	St Johns Food Pantry	Bartram Trail-Julington Creek	8	Johnson, Brad T.	Bartram Trail-Julington Creek	4	Racetrack Roadside Cleanup	Bartram Trail-Julington Creek	0
Admin Functions K	To	p 7 Service Project Hou	irs: 101	Rhodes, Tommy	Bartram Trail-Julington Creek	4	1	Top 7 Service Project A	mount: 0
My CLUB Shortcuts				Rowland, Parker	Bartram Trail-Julington Creek	4			
				Shine, James M. Jr.	Bartram Trail-Julington 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

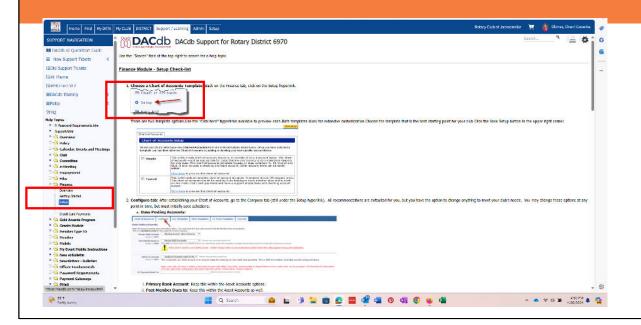


AGEMENT NAVIGATION	Bartram Trail-Juli	naton Creek	- Social Event -	Icemen 6	ame Mago	3744		Sea	rah 📇 🏘		
Engagement Summary	Saturday January 13,	2024							- *		
b Meetings	This page is a summary of meeting	g engagement. Member	data can be added using the	ADD button, or co	mected using the	penol dit.	Inc. Inc.	efresh Add to Cal	6.143 M		
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eeps	2 🖉 🗶 Johnson, Brad T.	Active				1.00	· · · · ·	Member Name:	Select one	0	
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nce Projects	100 C Rows							Exempt:	Check if member is Exer	npt (e.g., Rule of 85)	
nce projects								Meal Code:	Select one		
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Attendance - Training

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

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							
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EDACdb Training	2 Invoices								
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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?

