Welcome to Rotary

District 7750 Secretary's Workshop

Secretary's Role

As Secretary, you are the link between your club and the rest of the Rotary world. You perform many vital functions for your Club, the District and Rotary International. It is critical that these functions are both accurate and timely.

You have several resources available to assist you in learning about your role and duties:

my.rotary.org => Learning & Reference =>
Learn by Topic => Club Roles => Secretary

my.rotary.org => Learning & Reference => Learning Center =>
Get Ready: Club Secretary
Club Administration: Club Secretary

DACdb.com => Support/Training

- Attendance
- Club
- Officer Fundamentals
- Pmail

Rotary7750.org => Club Leader => Officers, Board & Committee Chairs => Secretary

Secretary's Duties

From Rotary's Recommended Club Bylaws: Article 4 Duties of Officers Section 4 – Secretary

"It shall be the duty of the secretary to:

Secretary's Duties

- Keep membership records
- Record the attendance at meetings
- Send out notices of club, board and committee meetings

Secretary's Duties

- Report as required to RI, including the semiannual reporting of membership on or before
 1 January and 1 July of each year
- Report changes in membership
- Perform other duties as usually pertain to the office of secretary."

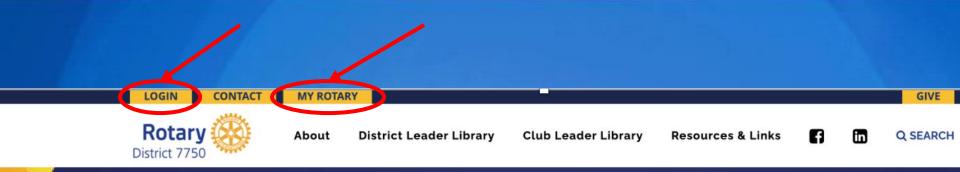
Secretary's Best Resources

www.dacdb.com

www.my.rotary.org

You can access either from:

www.Rotary7750.org





Welcome to Rotary District 7750 Serving Western South Carolina

District Leader

Assistant Governor Officers & Committee Chairs Calendars Newsletters Financial Reports

Club Leader

Presidents Officers, Board & Committee Chairs Membership & GRAT Newsletters

Resources & Links

Club List & Makeup Locations District Projects RI Resources, Manuals & Links



Welcome to Rotary International's District 7750. We are delighted you are visiting with us.

If you are a District 7750 Rotarian, we hope you will find our site fun and easy to navigate. It contains a treasure-trove of information about your fellow Rotarians, their Clubs, the District and Rotary International. We are constantly updating the site's information, so for the latest happenings in our District look on the web site first.

We we have a serie and and an end in the set of the set

Our District has joined with Rotarians around the world to practice our theme of

"Serve to Change Lives"

By "Doing Good in the World" By leading or participating in a Project By sponsoring a new Member By sharing Ideas and Resources to Make Your Club

Keeping Membership Records / Reporting Changes in Membership

Adding New Members to RI and DACdb

Adhering to these "best practices" in adding members to both RI (my.rotary.org) and the District (dacdb.com) databases will result in better data, less confusion, and easily accessible contact information for members and prospects.

ALWAYS, ALWAYS, ALWAYS begin in my.rotary.org!

Step 1: Add new Member to RI Database

- Sign into <u>www.my.rotary.org</u>
- Mouse over MANAGE
- Mouse over Club & District
 Administration

Click on Club Administration
 These steps are illustrated on the next slide

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\leftrightarrow \rightarrow C $$ https://my.rotary	.org/en/					<u>⊾</u> Q	☆	
🚱 Rotary DAF 🛛 🛞 RC Central Reports	dacdb.con	n 🕇 Z33_2016-20_Mem	How to Clear Your	. 💟 Vertical	Response:	>>	🔝 Rea	iding list
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Club & District Administra	tion ゝ	Club Administration						
Community Marketplace	>	District Administration						
Brand Center	Brand Center >							
Products & Services	Products & Services							
Travel & Expenses		Rotary Club Central						

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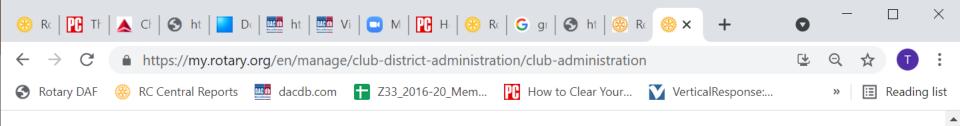
My Rotary

https://my.rotary.org/en/manage/club-district-administration/826

 \square

Click on Add, edit, or remove members

This step is illustrated on the next slide



Club Administration

Club Finances

🛱 Club Invoice

View your club's invoice, pay dues with a credit card, or update invoice preferences

Club invoice | Daily club balance report | Edit invoice preferences | About the club invoice | Rotary exchange rates

Club & Member Data

Update Member Data
 Report membership changes within 30 days, no later than 1 January or 1
 July, to ensure your club invoice reflects the latest information. Record new
 member sponsors.
 Add, edit, or remove members | Ad, edit, remove club officers |
 Record a new member sponsor.

 Wpdate Club Data
 Provide club contact information and choose club management providers.
 Update meeting details |

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Update mailing address and contact information

What do you want to do?



🖉 My Quick Links

You have no Quick Links. To add links, click on the ☆ icon and choose "Add to My Quick Links." To remove links, click on the ★ icon and choose "Remove from My Quick Links." Learn more.

🕖 FAQ & Help

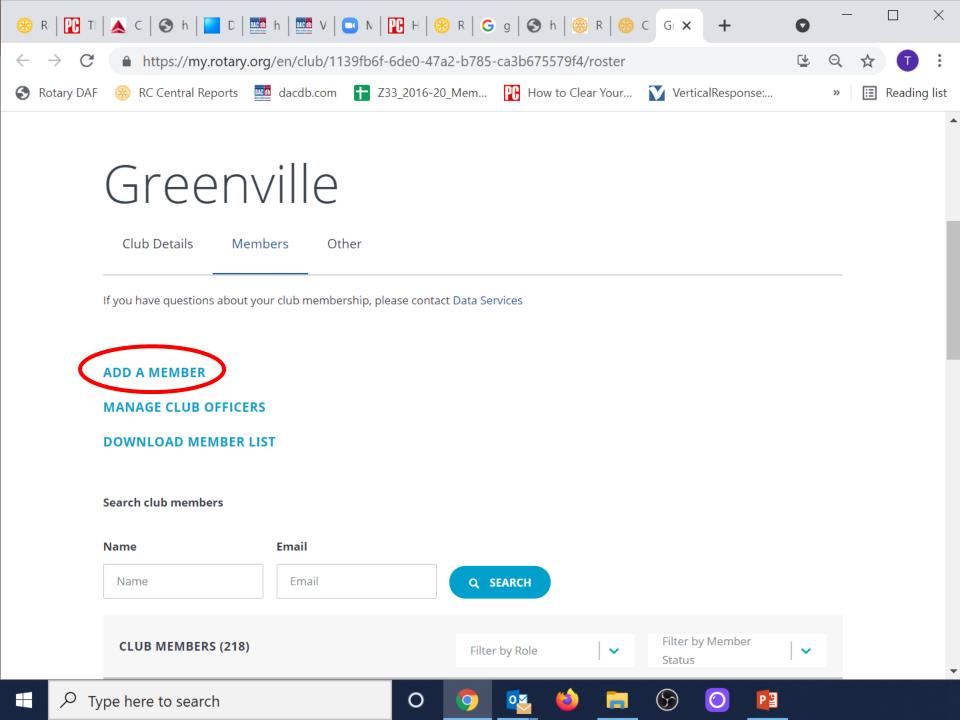
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Learn how to create a MyRotary account, pay your invoice,

Р 🗄

Click on ADD A MEMBER

This step is illustrated on the next slide



Identify Member

- Search by any of the following parameters
 - Email
 - Member ID (only applies to existing Rotarians)
 - First Name
 - Last Name

These steps are illustrated on the next slide

< Back | Step 1 of 3

Identify member

First, determine if the person is already in Rotary's database. Enter any information you have for them — only one field is required.

Note that this form accepts only Latin characters.

Email

Enter email

Member ID

Member ID

First name

Grace

Last name

Lewis

SEARCH

 If the search does not find your new member, click ADD AS A NEW MEMBER and follow the prompts to enter the minimal required fields.

You have successfully added your new member to RI, when you receive the following message:
 Successfully added (Name) to club with member ID #######.

 If the search finds that your new member has been/is a member of another Rotary club, do NOT create another record.

This scenario is illustrated on the next slide.

RESULTS	(13057)		Country/Region 🗸 Club type 🗸 Club 💙 Clear all
	Grace E. Lewis ID: 5689300	grace.lewis@law.state.ga.us	CONTINUE WITH THIS PERSON
	Grace S. Cephas-Lewis ID: 1701028	gcephaslewis@hotmail.com	CONTINUE WITH THIS PERSON
	Anna Grace Lewis ID: 5694718		CONTINUE WITH THIS PERSON
	Grace Marcine Lewis ID: 6018226 Castonia (no tary Club) Terminated	glewis@girlscoutsp2p.org	CONTINUE WITH THIS PERSON
	Grace Duplicate Lewis ID: 6584432		CONTINUE WITH THIS PERSON

Page 1 🗸

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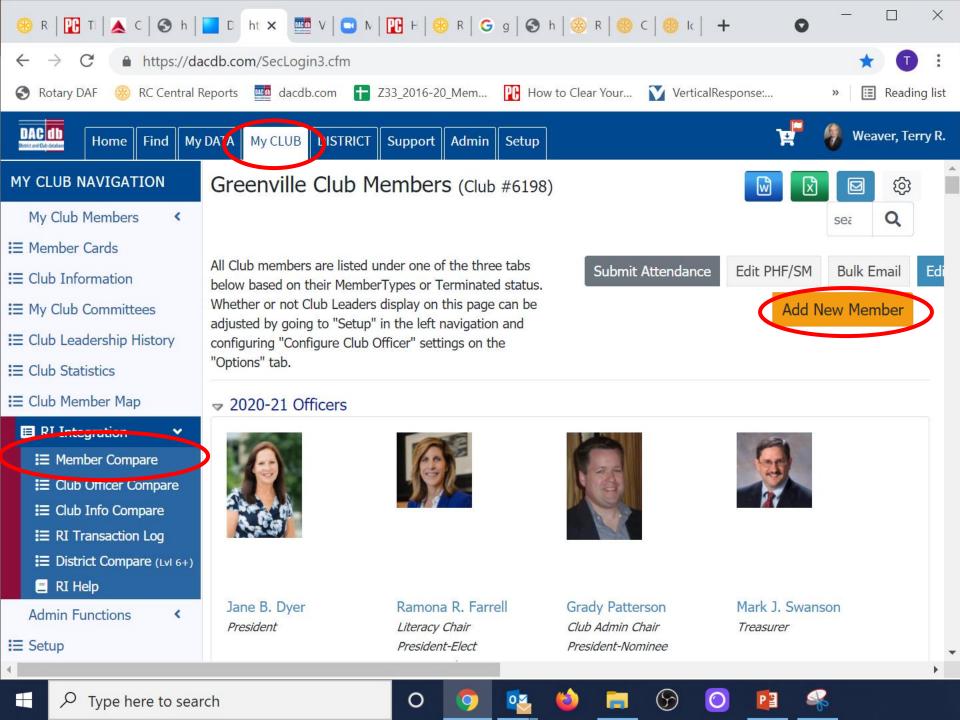
- Look at the information provided under each name.
- If "Terminated" appears under the member name, you may click
 CONTINUE WITH THIS PERSON to add this person to your club in RI.

 If "Terminated" does not appear under the member name, the member is still considered active in his/her previous club. You will need to contact that club secretary to have your new member terminated from that club before you can add this Rotarian to your club.

This scenario is illustrated on the next slide

Step 2: Add new Member to DACdb

- Sign into <u>dacdb.com</u>
- Click the My CLUB tab
- Click Club Members icon
- Click **RI Integration** in left panel
- Click Member Compare
 These steps are illustrated on the next slide



NOTE: If you have been tracking this new member in DACdb, first as a potential member, then as a proposed member, do NOT follow these instructions to officially add this person as a new member in DACdb. Refer to the slides "When a **Proposed Member Becomes a New** Member" for those instructions.

Club members who have records in the RI database will be displayed on the left; members with records in the DACdb database will be displayed on the right.

Locate your new member alphabetically in the Members in Rotary list on the left
Click Add to DACdb

These steps are illustrated on the next slide

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\leftrightarrow \rightarrow C $$ https://	dacdb.com/SecL	ogin3.cfm						Q	*	
🚱 Rotary DAF 🛞 RC Centra	al Reports 🛛 🛄 da	acdb.com	† Z33_20	16-20_Mem.	📭 How to	Clear Your	VerticalResponse:	**	🔝 Rea	ding list
DAC db Home Find My [DATA My CLUB		upport A	dmin Setu	р			¥	谢 Weaver,	Terry R.
RI NAVIGATION				rs in Rota	iry				ers in DAC	Cdb
: ≡Member Compare	Action	Member Name	Rotory ID	Birth Date	MemberType	!=	Member Name	Rotany ID	Birth Date	Memb
EClub Officer Compare	<u>Compare</u>	Alford, Jane L.	6568593	22-Mar-62	Active	Office EMail	<u>Alford, Jane L.</u>	6568593	22-Mar-62	Active-
i≡Club Info Compare i≡RI Transaction Log	Add to DACdb TERMINATE in RI	Baden, Michael S.	8751015	18-Sep-70	Honorary					
EDistrict Compare (Lvl 6+)	Compare	Douglas, William J	678807	09-Jan-39	Honorary	Name Home Address Start Date	<u>Douglas, William</u>	678807	09-Jan-39	Honora
My CLUB Shortcuts	<u>Compare</u>	Endres, Brian	8074171	10-Oct-71	Active	Name Office EMail Home Address Birth Date	<u>Endres, Brian</u>	8074171	03-Oct-71	Active
🌌 🔯 🔕 🍐 🚉 🕒	<u>Compare</u>	Graham, Terry	9809410		Active	Office Address	<u>Graham, Terry</u>	9809410		Active-
	<u>Compare</u>	Hagwell, Don	6709953	16-Mar-47	Active	Name Home Address Start Date	<u>Hagwell, Donald E</u>	6709953	16-Mar-47	Active
	<u>Compare</u>	Honeycutt, Jerry D	10090636	13-Feb-69	Active		<u>Honeycutt, Jerry D</u>	10090636	13-Feb-69	Active
	Add to DACdb	Kelly, Daniel L	10459921	26-Nov-56	Active					
	<u>Compare</u>	Mulvaney, John (Mick) Michael	6568627		Honorary	Name Office EMail Start Date Birth Date	<u>Mulvaney, John Michael</u>	6568627	21-Jul-67	Honora
	<u>Compare</u>	Neese, J Michael	9806498	22-Oct-69	Active	Name	Neese, J Michael	9806498	22-Oct-69	Active-
	<u>Compare</u>	Walker, Archie	10457433	10-Jul-76	Active	MemberType	Walker, Archie	10457433	10-Jul-76	Honora
4	<u>Compare</u>	Walker,	8211759	27-Mar-78	Honorary	Office EMail	<u>Walker, Lisa</u>	8211759	28-Mar-78	Honora 🗸
\rightarrow Type here to search							S	- Co		

You have now successfully added the new member to your club!!

All future updates to the member's record (e.g. address change/termination of membership) should be made in DACdb as these changes are automatically sent to RI.

You never need to open the member's record in RI again.

As an Aside: Member Compare

You should routinely use this feature to identify discrepancies in member records between the two databases.

The != column in the middle identifies data fields that do not match.

Anytime a non-member visits your club, attends a Discover Rotary event, participates in a service project, attends a fundraiser, etc., collect his/her contact information on a form similar to the one illustrated on the next slide.



Name
Cell
Email
Guest Of
□ I am a visiting Rotarian
□ I am interested in learning more about Rotary
□ I am interested in becoming a member of

this club

Add the Potential Member to DACdb:

- Sign into <u>dacdb.com</u>
- Click the My CLUB tab
- Click Club Members icon
- Click on Add New Member tab

These steps are illustrated on slide #29

Add the Potential Member to DACdb:

- Do NOT enter a number in the Rotary
 ID field leave it as 0
- Select Potential Member as the Member Type

These steps are illustrated on the next slide

Home Find My DATA						
DACdb Hollie Filld My DATA	My CLUB DISTRICT Support / Learning Admin	n			Rotary District 7750 - Lancaster	¥ 🔇
IEMBER NAVIGATION	ember Admin: New Member					
Club Members	Ve have a new, simplified version of the Me peed up and simplify new member entry. All	ember Admin form to enter new users. Or other fields will be available upon editing th	nly required fields are listed to ne user.			Car
	fember Photo Contact Club Login Bio	Alumni PData RLI CLI Partner/Spou	se Business Zone			
How to Adjust Profile	Member Information			Other Information		
How to Set Required Fields			PRV			
How to Set Privacy Settings IN CLUB Shortcuts	Account/District:*	7750		Club Start Date: 🚯	07/09/2023	
	Child	Lancaster		Birth Date: mm/dd(/yyyy) 🚯		
è 🗠 🕑 🐸 🕒	Rotary ID:	0		Birth Place: ()		
ISTRICT Shortcuts	Member Type:*	Potential Member		Sponsor Name (1):		
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	First Name:*]	Sponsor Count: 🕕	0	
	Middle Name:			Languages Spoken:		
	Last Name:*					
	Suffix:					
	Gender:	{Select} ~				
1	Badge Information					
			PRV			
	Badge/Nick Name: 🕕					
	Badge Title: 🚯					
	Badge Number:	-				

Add the Potential Member to DACdb:
Complete the required fields for the Member Tab:
First Name
Last Name

- Gender
- Club Start Date

These steps are illustrated on the next slide

Home Find My D	DATA My CLUB DISTRICT Support / Learning Admin				Ro	tary District 7750 - Lancaster 🏻 🎦	🜒 Maxfield, Regina A
	Member Admin: Scott Maxfield Rotary District: 7750						EN ~
E My Engagement/Attendanc						Terminate Member	Cancel Save
I My Finance Statement	Member Photo Contact Club Login Bio A	Numni PData RLI CLI Partner/Spo	use Business Zone Log				
 ⋮ ■ My Rotary ⑦ How to Adjust Profile 	Member Information			Other Information			
⑦ How to Set Required Fields			PRV				PRV
⑦ How to Set Privacy Settings My CLUB Shortcuts	Account/District:* Club:*	7750 Lancaster		Club Start Date: () Birth Date: mm/cot(),,,,) •	07/13/2023		
DISTRICT Shortcuts	Rotary ID: Member Type:	U Potential Member		Birth Place: () Sponsor Name (1):			
0 🗟 🕒 🍐 🖾 🌌	First Name:*	{Select}		Sponsor Name (2): Sponsor Count: ① Languages Spoken:	0		
	Last Name:* Suffix:	Maxfield		Languages Sporen.			
	Gender:	Male					
	Badge Information		PRV				
	Badge/Nick Name: () Badge Title: ()						
	Badge Number:						

Created by: Maxfield, Regina A. on 07/09/23 at 18:55 ET

Last Updated by: Maxfield, Regina A. on 07/09/23 at 18:55 ET

Add the Potential Member to DACdb:

- Complete the fields for which you have data on the Contact Tab:
 - Email
 - Cell Phone
- Click the Add button in the upper right corner

These steps are illustrated on the next slide

Home Find My	DATA My CLUB DISTRICT Support / Learning Admin				Rotary District 7750 - Lancaster	r 🏋 🊷 Maxfield, Regina A.
MEMBER NAVIGATION	Member Admin: New Member We have a new, simplified version of the Memb speed up and simplify new member entry. All other Member Phy to Contact C b Login Bio Alt	r fields will be available upon editir	ng the user.			EN ~
 My Rotary How to Adjust Profile How to Set Required Fields How to Set Privacy Setting: My CLUB Shortcuts Mission C. 200 DISTRICT Shortcuts Mission C. 200 Mission C.	Phone Information	704-555-1234 704-555-5678		Address Information Preferred Address:* Primary Address Type:* (line 2 if needed) (Line 3 if needed) City* State/Province: Zip Code: Country:*	Home v Home v North Carolina v UNITED STATES v	
	Email Information Primary Email:* Reimary Email Type:* Contact Preferences Please save user before adding preferences	scott.maxfield@gmail.com Home	· ·	Social Media Information Please save user before adding social Contact Privacy Permissions: Opt Out:		

https://www.dacdb.org

You may now include Potential Members in Pmail communications.

Attend the Advanced DACdb session to learn more about Pmail.

When a Potential Member Becomes a Proposed Member

When a potential member becomes a proposed member, i.e. an application has been completed and signed by both the proposed member and his/her sponsor, simply change the **Member Type** in the member's DACdb record.

This step is illustrated on the next slides

Home My DATA M	y CLUB DISTRICT Support /	Training			Rotary Di	strict 7750 - Lancaster 🏻 📜		axfield, Regir
CLUB NAVIGATION My Club Members <	Bobby E. Bailey President	Matherline Williamson Membership Chair, President- Elect, Rotaract Club Sponsor	Regina A. Maxfield Rotary Foundation Chair, Secretary, Secretary-	Altheresa Goode-Howard iPast President	James David Sims President- Nominee, Technology Chair	Elizabeth Hyatt Club Director	Debra P Public Image Director,Inte	
Club Statistics I Club Member Map I Club Badge Numbers I RI Integration I Admin Functions I Setup I Help Functions I	Charlene McGriff Club Director	Eddie C Boykin Chaplain, Rotaract Club Sponsor	Elect, Treasurer, Treasurer-Elect	Gary R. Blackham CART Chair	Sharon V. Teague Membership Chair,Past President	Robert H. Collins Jr. Rotaract Club Sponsor,RYLA Chair		son Jordan
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Home My DATA	My CLUB DISTRICT Support	t / Training			Rotary Di	strict 7750 - Lancaster 🛛 🎦	Maxfield, Reg
1Y CLUB NAVIGATION	President	Membership Chair, President- Elect, Rotaract Club Sponsor	Rotary Foundation Chair,Secretary,Secretary- Elect,Treasurer,Treasurer-Elect	iPast President	President- Nominee,Technology Chair	Club Director	Public Image/PR Chair,C Director,Internal PR Cha
My Club Members < Member Cards Club Information	<i>(</i>)			Ge	6	(F)	
My Club Committees Club Leadership History							P
Club Statistics	Charlene McGriff	Eddie C Boykin	Richard A. Band	Gary R. Blackham	Sharon V. Teague	Robert H. Collins Jr.	Susan Cason Jordan
Club Member Map Club Badge Numbers	Club Director	Chaplain,Rotaract Club Sponsor	Literacy Chair	CART Chair	Membership Chair,Past President	Rotaract Club Sponsor,RYLA Chair	RYLA Chair
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Help Functions CLUB Shortcuts	Assistant District Governor	Member Name Me Evans, Michelle Po Maxfield, Scott Po Menuel, Suzanne Po 3 Potential Members Po	ember Type Terminated Date Date	➡ Terminated →	Date Phone Phone	Cell Phone + Cell Phone + 3-285-5801 702-496-0391 1 704-231-5108 3	mevans@kvlt.org

👔 Maxfield, Regina A. DACdb Rotary District 7750 - Lancaster 👘 🔄 Home Find My DATA My CLUB DISTRICT Support / Learning Admin MEMBER NAVIGATION Member Admin: Scott Maxfield EN Rotary District: 7750 to Club Members Terminate Member i≡ My Engagement/Attendanc Save I≡ My Finance Statement Member Photo Contact Club Login Bio Alumni PData RLI CLI Partner/Spouse Business Zone Log I My Rotary **Other Information** Member Information ⑦ How to Adjust Profile PRV PRV ⑦ How to Set Required Fields ⑦ How to Set Privacy Settings Account/District:* 7750 Club Start Date: () 07/13/2023 My CLUB Shortcuts Club:* Lancaster Birth Date: mm/dd(/yyyy) () 🚳 🔛 🎍 🛈 🚳 Rotary ID: 0 Birth Place: () Member Type:* Proposed \sim Sponsor Name (1): DISTRICT Shortcuts (Soloct) Prefix Sponsor Name (2): 🍳 🍰 🕒 🍐 🖾 🌌 First Name:* Scott Sponsor Count: () 0 Middle Name: Languages Spoken: Last Name:* Maxfield Suffix: Gender: Male **Badge Information** PRV Badge/Nick Name: 🚯 Badge Title: 🚯 Badge Number: Created by: Maxfield, Regina A. on 07/09/23 at 18:55 ET Last Updated by: Maxfield, Regina A. on 07/09/23 at 18:59 ET https://www.dacdb.org

When a Potential Member Becomes a Proposed Member

Once the proposed member has been approved by the board and club members have had an opportunity to voice any concerns/objections, do NOT yet add the new member to the RI database.

When a Potential Member Becomes a Proposed Member

A recommended "best practice" is to invoice the new member for dues, meals, etc. per your club's practice. Only when the new member's payment has arrived, is it time to induct the member and add him/her to the RI database.

When a Proposed Member Becomes a New Member

Add the new member to the RI Database as described beginning on Slide #14.

Remember to search to see if your new member is a Prior Rotarian.

When you get to Step 2: Add new Member to DACdb, STOP and follow the instructions on the next slide.

When a Proposed Member Becomes a New Member

To make a member you have been tracking thru DACdb (first as a Potential Member and then as a Proposed Member) an Active member in your club, simply edit the following fields in the member's DACdb record:

When a Proposed Member Becomes a New Member

- Enter the Rotary ID assigned when you entered the member in my.rotary.org
- Change the Member Type to Active
- Change the **Start Date** to the date you entered the member in my.rotary.org.

This step is illustrated on the next slides

Home My DATA M	y CLUB DISTRICT Support /	Training			Rotary Dis	rrict 7750 - Lancaster 🏻 🏋	Maxfield, Regina
MY CLUB NAVIGATION ■ My Club Members ■ Member Cards ■ Club Information ■ My Club Committees ■ Club Leadership History	Bobby E. Bailey President	Matherline Williamson Membership Chair, President-	Regina A. Maxfield Rotary Foundation	Altheresa Goode-Howard iPast President	James David Sims President-	Elizabeth Hyatt	Debra P. Jaillette Public Image/PR Chair,Club
I≡ Club Statistics		Elect,Rotaract Club Sponsor	Chair, Secretary, Secretary- Elect, Treasurer, Treasurer-Elec	ct	Nominee, Technology Chair		Director,Internal PR Chair
 E Club Member Map Club Badge Numbers RI Integration < Admin Functions 	Charlene McGriff		Richard A, Band			Robert H. Collins Jr.	
⋮≡ Setup? Help Functions <	Club Director	Eddie C Boykin Chaplain,Rotaract Club Sponsor	Literacy Chair	Gary R. Blackham CART Chair	Sharon V. Teague Membership Chair,Past President	Rotaract Club Sponsor,RYLA Chair	Susan Cason Jordan RYLA Chair
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I≡ My Finance Statement	Member Photo Contact Club Login Bio Alu	mni PData RLI CLI Partner/Spous	e Business Zone Log			
☷ My Rotary						
⑦ How to Adjust Profile	Member Information			Other Information		
⑦ How to Set Required Fields			PRV			PRV
⑦ How to Set Privacy Settings	Account/District:*	7750		Club Start Date: 🕕	07/27/2023	
My CLUB Shortcuts	Club:*	Luncustor		Birth Date: mm/dd(/yyyy)	07/12/1955	
کے 🐸 🖸 실 🔄	Rotary ID:	12345678		Birth Place: 🕕		
DISTRICT Shortcuts	Member Type:*	Active		Sponsor Name (1):	Regina A. Maxfield	
	i tenas	{Select}		Sponsor Name (2):		
0 🗟 🕒 🍐 🖾 🐸	First Name:*	Scott	_	Sponsor Count: 🕕	0	
	Middle Name:	Р		Languages Spoken:		
	Last Name:*	Maxfield				
	Suffix:					
	Gender:	Male ~				
	Deduc Toformation					
	Badge Information		PRV			
			PRV			
	Badge/Nick Name: 🚯					
	Badge Title: 🕕					
	Badge Number:					
	Created by: Maxfield, Regina A. on 07/09/23 at 18:55 ET Last Updated by: Maxfield, Regina A. on 07/09/23 at 18:59 ET					

Terminating Members

To terminate a member in compliance with your club's bylaws:

- Access My Club in DACdb
- Click on the X beside the member's name
- Click on Terminate Member

These steps are illustrated on the next slides.

Ie=UTF8&pldnNew Bobby E. Bailey Matherline Williamson Regina A. Maxfield Altheresa Goode-Howard James David Sims CLUB NAVIGATION President Membership Chair,President- Elect, Rotaract Club Sponsor Rotary Foundation Chair,Secretary.Elect IPast President President- Nominee, Technology Chair President- Nominee, Technology Chair v Club Members V Image: Charlene McGriff Membership Chair,President- Elect, Rotaract Club Sponsor Rotary Foundation Chair,Secretary.Elect IPast President President- Nominee, Technology Chair v Club Committees V Image: Charlene McGriff			
B NAVIGATION ub Members ub Members cer Cards Information ub Committees Leadership History Statistics Member Map Badge Numbers Badge Numbers cub Director Charlene McGriff Sportsor Sharnel Literacy Chair Sastant District Covenor Sharnel Literacy Members Proposed Terminated Members Y <td< th=""><th>t 7750 - Lancaster 🛛 📜</th><th>Max Max</th><th>dield, Regir</th></td<>	t 7750 - Lancaster 🛛 📜	Max Max	dield, Regir
Information Ub Members <	Elizabeth Hyatt	Debra P.	Jaillette
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Assistant District Governor Assistant District Governor Assistant District Governor Assistant District Governor Active/Honorary Members Other Members Potential Members Proposed Terminated Members # Action Member Name Member Arge Position Home Office Phone Cell Phone EMail 1 Active Active, William Active Active 803-286-5194 803-283-2303 803-286-7457 bardrey42@yahoo.com			
Active/Honorary Members Other Members Potential Members Proposed Terminated Members # Action Member Name Member + Type Club Position + Phone Office Phone Cell Phone + EMail 1 Image: Comparison of the terminated state Ardrey, William Image: Ardrey, William Image: Comparison of terminated state 803-286-5194 803-283-2303 803-286-7457			
Active/Honorary Members Other Members Potential Members Proposed Terminated Members # ✓ Action Member Name ♦ Member + Type Club Phone ♦ Office Phone € Cell Phone € EMail 1 ✓ ✓ X Image: Ardrey, William Image: Ardrey Active 803-286-5194 803-283-2303 803-286-7457 bardrey42@yahoo.com			
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# Action Member Name Type Position Phone Cell Phone EMail 1 Image: Ardrey, William Image:			
	♦ Terminat Date		Start Da
Ck on 2 2 🗹 🏒 🛒 📓 Bailey, Bobby E. 🖻 Active President 803-286-8151 803-804-0124 btbailey@comporium.net		~	01 Sep 1
	t	~	18 Nov 2
Active-R85 Literacy 803-285-6691 803-287-7907 rband@comporium.net		~	01 Nov 1
minate 4 2 (2) 1 Blackham, Gary R. b Honorary CART Chair 541-513-6915 541-515-4855 grblackham@gmail.com		~	06 Dec 2
ember 5 2 2 1 2 Bohonak, Noni M. Active 803-285-6151 803-313-7136 803-289-8697 nbohonak@mailbox.sc.edu	edu		01 Nov 2
6 Z Z X I S Boykin, Eddie C A Active Chaplain Rotaract Club 803-283-8554 803-313-7188 719-510-2403 ecboykin@mailbox.sc.edu	lu	~	14 May

👔 Maxfield, Regin Rotary District 7750 - Lancaster 🛛 🎽 Home Find My DATA My CLUB DISTRICT Support / Learning Admin MEMBER NAVIGATION Member Admin: Scott Maxfield Rotary District: 7750 🔅 Club Members I My Engagement/Attendanc

Member Photo Contact Club Login Bio Alumni PData RLI CLI Partner/Spouse Business Zone Log I My Rotary Member Information ⑦ How to Adjust Profile ⑦ How to Set Required Fields ⑦ How to Set Privacy Settings My CLUB Shortcuts 3 i 🏜 لللل DISTRICT Shortcuts 🝳 🚑 🖻 💩 🖾 🌌

I≡ My Finance Statement

Account/District:*	7750	
Club:*	Lancaster ~	
Rotary ID:	12345678	
Member Type:*	Active ~	
Prefix:	{Select} ~	
First Name:*	Scott	
Middle Name:	P	
Last Name:*	Maxfield	
Suffix:		
Gender:	Male	

Other Information

Club Start Date: 🚯	07/09/2023
Sirth Date: mm/dd(/yyyy) 🕕	07/12/55
irth Place: 🕕	
ponsor Name (1):	
ponsor Name (2):	
sponsor Count: 🚯	0
anguages Spoken:	

EN

Save

PRV

Badge Information PRV Badge/Nick Name: 🚯 Badge Title: 🚯 Badge Number:

Created by: Maxfield, Regina A. on 07/09/23 at 18:55 ET

Last Updated by: Maxfield, Regina A. on 07/09/23 at 19:12 ET

Terminating Members

- Enter the Date of Termination (date cannot be older than 30 days in the past)
- Identify the Reason for Termination
- Click Terminate Member

These steps are illustrated on the next slide.

Home Find My DATA My CLUB DISTRICT Support / Learning Admin

MY CLUB NAVIGATION

<

<

<

- My Club Members
- I≡ Member Cards

I≡ Club Information

I≡ My Club Committees

I≡ Club Leadership History
I≡ Club Statistics

I≡ Club Member Map

Club Badge Numbers

RI Integration

■ Admin Functions
I≡ Setup

? Help Functions My CLUB Shortcuts

 Image: Control of the second secon

Member Termination Verification: Scott P Maxfield 1d=801217736 Rotary District: 7750

Important

Complete the member termination process by entering the term date and term reason below. 1) Termination Date cannot be more than 30 days prior or after the current date (current date +/- 30) 2) Termination Date cannot be earlier than the admission date in this club.

Notice

Member Terminations will now take effect at the end of the day for the "Term" date entered below. This means the member will remain active in your Club and DACdb and can access the system until that time. If the "Term" date is before today - the member will be immediately terminated in DLoop, in the "Term" date is before to a strain in DACdb and can access the system until that time. If the "Term" date is before today - the member will be immediately terminated in DLoop, in the "Term" date is before today - the member will be immediately terminated in DLoop, in the

"Term" date is today, the member will remain active in DACdb until the end of the day.

Name:	Scott P Maxfield	
Club:	Lancaster	
Member ID:	12345678	
Admission Date:	07/09/2023	
Gender:	М	

Date of Termination:*	07/27/2023				
Date of Death:	mm/dd/yyyy				
Reason for Termination:*					
○ Health	○ Personal				
O By club for cause	○ Non-attendance				
O Lack of participation	Business Obligations (Letter Sent)				
O Relocation (Letter Sent)	○ Deceased				
 Joining New Club (Letter Sent) 	O Non-payment of club dues				
O Family Obligations (Letter Sent)	○ Financial				
○ Not Interested	O Duplicate Member in DACdb (DACdb Only)				

Rotary District 7750 - Lancaster 🛛 🙀 Maxfield, Regina A.

Maintain Member Records

Use DACdb to maintain as much information as you like about each member, including:

- Photo
- Contact Information
- Spouse's name, birthday & anniversary
- Employer and job position
- Rotary participation data
- Member's club information
- Login credentials
- Bio/Resume information
- Other community involvement
- RLI participation

202		_				-
DACOD Home Find My DAT	TA My CLUB DISTRICT Support / Learning Admi				Rotary District 7750 - Lancaster	👷 🛛 🐧 Maxfield, Regina
MEMBER NAVIGATION	Member Admin: Regina Maxfield					EN ~
⇔ Enter Makeup	Rotary District: 7750					
\$ Finance Center					Terminate Membe	Cancel Save
ເຈົ່າ Club Members	Member Photo Contact Club Login Bio	Alumni PData RLI CLI Partner/Spouse	Business Zone Log			
E My Engagement/Attendanc						
E My Finance Statement	Member Information			Other Information		
i≡ My Rotary			PRV			PRV
⑦ How to Adjust Profile	Account/District:*	7750		Club Start Date: 🕕	09/15/2009	
⑦ How to Set Required Fields	Club:*	Lancaster ~		Birth Date: mm/dd(/yyyy) 🚯	07/27/63	
⑦ How to Set Privacy Settings	Rotary ID:	3398772		Birth Place: 1		
My CLUB Shortcuts	Member Type:*	Active ~		Sponsor Name (1):	Malcolm Edwards	
🗠 😻 💽 👞 🗑	Prefix:	Ms. ~		Sponsor Name (2):		
DISTRICT Shortcuts	First Name:*	Regina		Sponsor Count: 🚯	0	
0 🚑 🕒 🍐 🖾 🐸	Middle Name:	Α.		Languages Spoken:		
S 💀 🖸 🥹 🔛 💌	Last Name:*	Maxfield				
		F				
	Gender:	Female ~				
	Badge Information			Use these t	tabs to access/enter	
			PRV		data for each member	
				auditional		
	Badge/Nick Name: ()	Regina				
	Badge Title: 1					
	Badge Number:					

Created by: Weaver, Pamela J. on 03/12/10 at 22:53 ET Last Updated by: Jones, Chris on 04/18/23 at 09:40 ET

Maintain Member Records

Some data are more important than others for Rotary statistics/purposes:

- Gender
- Birthdate (including year!)
- Email
- Phone
- Opt out of communications

Semi-Annual Reporting of Membership

RI has simplified the semi-annual reporting process. Clubs no longer have to submit a SAR form. RI bills clubs based on membership records on July 1 and January 1. The best way to ensure your club is billed properly is to keep your membership records current.

Keeping & Reporting Attendance

Attendance Member Types

 Active – attendance required
 Rule of 85 – attendance NOT required but absences affect member's Perfect
 Attendance Record

Attendance Member Types

- Leave of Absence attendance excused but must be included in club's attendance calculations and affects Perfect Attendance Record for the member
- Honorary attendance not required and NOT included in club's attendance

Attendance Rule of 85

Rule of 85 – From Club Secretary's Manual: "count them as present if they attend a club meeting but do not count them as absent if they do not attend"

Attendance Rule of 85

Prerequisites for Rule of 85 Eligibility:

- Must be an Active Member
- Must have been a Rotarian for minimum of 20 years
- Member's age plus number of years in Rotary must equal or exceed 85

Attendance Rule of 85

Once the Rule of 85 prerequisites are met, the member must submit, in writing, a request to be considered an Active - Rule of 85 member.

Attendance Rule of 85

DACdb offers a report to identify club members eligible for Rule of 85:

- Log into DACdb
- Click on My CLUB
- Click on Reports Icon
- Scroll down to Report #15.30 Rule of 85
 Eligibility Report

Attendance Make-Ups

An Attendance Make-Up counts as if the member was present at a meeting.

The Make-Up activity must occur within 14 days (before or after) the missed meeting to which it is applied.

Attendance Make-Ups

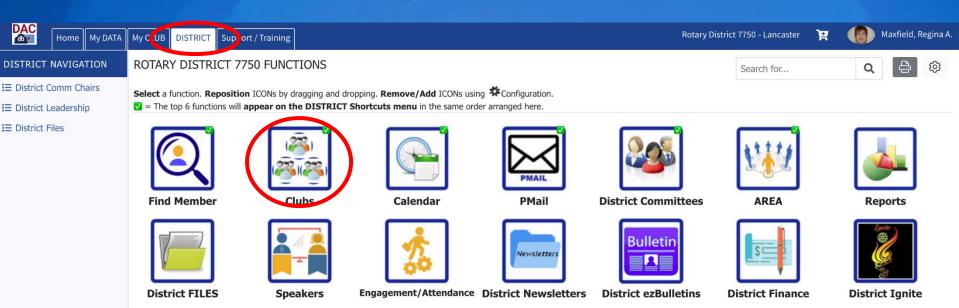
Activities that qualify as Meeting Make-Ups:

- Visit another club's meeting
- Attend an online club meeting (E-Club)
- View another club meeting online
- Attend a club board or committee meeting (1 hr minimum)
- Attend a District or RI event
- Participate in a Rotary Service Project (1 hr minimum)

As an Aside: Locating a Club for a Make-Up Visit

- Log into DACdb
- Click on DISTRICT
- Click on Clubs icon
- Click on Where Clubs Meet in the left panel

These steps are illustrated on the next slides.





District Websites

Note: You can customize the icons you wish displayed when you access DACdb, and you can position them as you wish. Your screen, therefore, will not look exactly as mine.

Maxfield, Regina A. Rotary District 7750 - Lancaster Ŧ Home My DATA My CLUB DISTRICT Support / Training Rotary District 7750 Clubs 🐱 🖻 🖶 🌣 CLUBS NAVIGATION Q search ... Club Listing

All of the clubs in this District are shown below. Use the display options to filter the results.

Greenville Breakfast

Greenville City Center

Where Clubs Meet

Map to Clubs Club Positions

O Ignite

Q Awards

My CLUB Shortcuts

~ × (i 2 \bowtie يلغى ا **DISTRICT Shortcuts** ۵ 🌉

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# 🔲	Action	Club Name	Club Badge Name	Club Type	÷ /	REA	≑ RI	÷	Club Size	
L		Abbeville	Abbeville	Rotary Club		9	RI Direct		39	
2		Aiken	Aiken	Rotary Club		8	RI Direct		172	
3		Aiken Sunrise	Aiken Sunrise	Rotary Club		8	RI Direct		38	
1		Anderson	Anderson	Rotary Club		1	RI Direct		93	
5		Anderson Satellite - Electric City	Anderson Electric City	Satellite Club		1	Off		20	
5		Batesburg-Leesville	Batesburg-Leesville	Rotary Club		8	RI Direct		21	
7		Blacksburg	Blacksburg	Rotary Club		5	RI Direct		18	
3		Carolina Foothills	Carolina Foothills	Rotary Club		4	RI Direct		23	
9		Chester	Chester	Rotary Club		7	RI Direct		49	
10		Clemson	Clemson	Rotary Club		1	RI Direct		92	
11		Clemson Sunrise	Clemson Sunrise	Rotary Club		1	RI Direct		33	
12		Clinton	Clinton	Rotary Club		10	RI Direct		36	
13		Clover	Clover	Rotary Club		5	RI Direct		24	
14		E-Club of the Carolinas	E-Club of the Carolinas	Rotary Club		9	RI Direct		26	
15		McCormick Satellite	McCormick Satellite	Satellite Club		9	Off		8	
16		Easley	Easley	Rotary Club		12	RI Direct		67	
17		Emerald City (Greenwood)	Emerald City	Rotary Club		9	RI Direct		64	
18		Emerald City Evening Satellite	Emerald City Evening Satellite	Satellite Club		9	Off		14	
19		Lander University Rotaract	Lander University Rotaract	Rotaract Club		9	RI Direct		1	
20		Fort Mill	Fort Mill	Rotary Club		6	RI Direct		77	
21		Fountain Inn	Fountain Inn	Rotary Club		11	RI Direct		39	
22		Gaffney	Gaffney	Rotary Club		5	RI Direct		62	
23		Golden Strip Sunrise	Golden Strip Sunrise	Rotary Club		11	RI Direct		15	
24		Greater Anderson	Greater Anderson	Rotary Club		1	RI Direct		70	
25		Greenville	Greenville	Rotary Club		3	RI Direct		206	

Rotary Club

Rotary Club

3

3

RI Direct

RI Direct

15

55

Greenville Breakfast

Greenville City Center

Record Attendance at Meetings

Use a form similar to the one illustrated on the next slide, or use the Attendance Module offered through DACdb, to document attendance at each club meeting.

Note: If you use a form, create it using Excel as it is much easier to edit than a Word document.

	Rotary Atte	nd	ance Roste	Meeting Date					
Last Up	dated: 04/01/2022								
M	Member Name	R	Member Name	R	Member Name		Member Name		
	Ardrey, Bill		Jaillette, Debbie			15	"Rule of 85"Members		
	Bailey, Bobby		Johnson, Stan			38	Active Members		
	Band, Richard		Joplin, April						
	Bohonak Noni		Jordan, Susan			53	Total Active Members		
	Boykin, Eddie		Lawson, Jessica						
	Brockmann, Andreas		Lomax, Courtney						
	Bundy, Charlie		Maxfield, Regina						
	Carnes, Amanda		McGriff, Charlene						
	Carter, Kip		McWhirter, Gary			1			
	Cauthen, Hazel		Morin, Joyce						
	Collins, Bobby		Mungo-Brown, Porsha						
	Croston, JR		Myers, Tommy						
	Deese, Annette		Norrell, Mitch						
	DeVenny, Alston		Outlaw, Melanie						
	DeVenny, Susan		Plyler, Jodie						
	Durham, Larry		Rinard, Jane						
	Emanuel, Phil		Rushing, Sonny						
	Gardner, Don		Rutledge, John						
	Goode-Howard, Altheresa		Sims, David						
	Gordon, Chris		Small, Brad						
	Greene, Michael		Teague, Sharon			2	Honorary Members		
	Gregory, Greg		Tolson, David				Blackham, Gary		
	Grider, Wesley		Waldrop, Faynette				Heinzerling, George		
	Hardin, Thomas		Williamson, Matt				g,g_		
	Hicklin, Marion		Wilson, Keith						
	Hutfles, Flip		Wilson, Keeonn						
	Hyatt, Elizabeth		,			55	Total Members		
	Member Name & Make-up Date(s)				Member Name & Mak	e-up l	Date(s)		

Attendance Calculations

- Count the number of members present
- Add the number of make-ups
- This sum becomes your numerator
- Subtract the number of Rule-of-85 members who were absent from the total number of Active members in club
- This difference becomes your denominator

These calculations are illustrated on the next slide.

	Rotary Atte	ance Roste	Meeting Date	04-28-2022					
Last Upd	ated: 04/01/2022								
M	Member Name	M	Member Name	M	Member Name		Member Name		
	Ardrey, Bill	$\overline{\mathbf{v}}$	Jaillette, Debbie			15	"Rule of 85"Members		
$\overline{\mathbf{v}}$	Bailey, Bobby	$\overline{\mathbf{v}}$	Johnson, Stan				Active Members		
\checkmark	Band, Richard	\checkmark	Joplin, April						
\checkmark	Bohonak Noni		Jordan, Susan			53	Total Active Members		
\checkmark	Boykin, Eddie	\checkmark	Lawson, Jessica			- 5	Absent Rule of 85		
	Brockmann, Andreas	\checkmark	Lomax, Courtney			48	Denominator		
\checkmark	Bundy, Charlie	\checkmark	Maxfield, Regina						
-	Carnes, Amanda	\checkmark	McGriff, Charlene			36	Members Present		
\checkmark	Carter, Kip		McWhirter, Gary			2	Make-ups		
	Cauthen, Hazel	м	Morin, Joyce			38	Numerator		
\checkmark	Collins, Bobby	$\overline{\mathbf{v}}$	Mungo-Brown, Porsha						
-	Croston, JR	\checkmark	Myers, Tommy						
\checkmark	Deese, Annette	-	Norrell, Mitch				38 / 48 = 79.17%		
\checkmark	DeVenny, Alston	\checkmark	Outlaw, Melanie						
-	DeVenny, Susan	\checkmark	Plyler, Jodie						
	Durham, Larry	-	Rinard, Jane						
\checkmark	Emanuel, Phil	\checkmark	Rushing, Sonny				1		
$\overline{\mathbf{v}}$	Gardner, Don	\checkmark	Rutledge, John						
$\overline{\mathbf{V}}$	Goode-Howard, Altheresa	\checkmark	Sims, David						
$\overline{\mathbf{V}}$	Gordon, Chris	-	Small, Brad						
$\overline{\mathbf{V}}$	Greene, Michael	\checkmark	Teague, Sharon			2	Honorary Members		
-	Gregory, Greg	Ĺ	Tolson, David				Blackham, Gary		
	Grider, Wesley	- <u>,</u>	Waldrop, Faynette				Heinzerling, George		
\checkmark	Hardin, Thomas	$\overline{\mathbf{v}}$	Williamson, Matt				0,		
V	Hicklin, Marion		Wilson, Keith						
	Hutfles, Flip	м	Wilson, Keeonn						
	Hyatt, Elizabeth					55	Total Members		
	• •			•		_			
M=	Make-up	L=	Leave of Absence						
	Member Name & Mak	e-up [Date(s)		Member Name & Make-up Date(s)				
				•					

Report Monthly Attendance to Board of Directors

Calculating the monthly attendance average:a. Add the numerators for a sumb. Add the denominators for a sumc. Divide the result of "a" by the result of "b"

This calculation is illustrated on the next slide.

Report Monthly Attendance to Board of Directors

Week #1: 38 / 48 Week #3: 32 / 47 Week #2: 36 / 47 Week #4: 36 / 48

a. Add the numerators: 38 + 36 + 32 + 36 = 142

b. Add the denominators 48 + 47 + 47 + 48 = 190

c. Divide result of "a" by result of "b" 142 / 190 = 76.74%

Updating Club Information

Updating Club Information

To VIEW current club information:

- Log into DACdb
- Click on My CLUB
- Click on Club Information icon

To EDIT club information:

- Log into DACdb
- Click on MY CLUB
- Click on Club Members
- Click on Edit Club

DAC (db) Maxfield, Regina A Rotary District 7750 - Lancaster 1 My CLUB DISTRICT Support / Training Home My DATA MY CLUB NAVIGATION Lancaster Club Members (Club #6202) ඟ Q search for .. < All Club members are listed under one of the three tabs below based on their MemberTypes or Terminated Submit Attendance Edit PHF/SM Bulk Email Edit Club Acd New Member I≡ Member Cards status. Whether or not Club Leaders display on this page can be adjusted by going to "Setup" in the left navigation and configuring "Configure Club Officer" settings on the "Options" tab. ∃ Club Information I≡ My Club Committees 2021-22 Officers I≡ Club Leadership History ∃ Club Statistics I≡ Club Member Map Club Badge Numbers RI Integration < Bobby E. Bailey Matherline Williamson Regina A. Maxfield Altheresa Goode-Howard James David Sims Elizabeth Hyatt Debra P. Jaillette < President Membership Chair, President-Rotary Foundation iPast President

I≡ Setup

My CLUB Shortcuts

DISTRICT Shortcuts

<

Charlene McGriff Eddie C Boykin

Chaplain, Rotaract Club Sponsor

Chair, Secretary, Secretary-

Elect, Treasurer, Treasurer-Elect

Literacy Chair

Garv R. Blackham

CART Chair

President

Rotaract Club Sponsor, RYLA Chair

RYLA Chair

Elect,Rotaract Club Sponsor



Richard A. Band



President-Nominee, Technology Chair

Public Image/PR Chair,Club

Director, Internal PR Chair

































Membership Chair, Past

Robert H. Collins Jr.

Susan Cason Jordan



? Help Functions





Shamieka Johnson Sims Assistant District Governor

Home My DATA	My CLUB DISTRICT Supp	port / Training	Rotary District 7750 - Lancaster 🏾 😭 Maxfield, Regina A						
	Club Admin: Lan	Caster (Club #6202) id=6202							
	Update the Club information		Cancel View Update						
I≡ Member Cards									
I≡ Club Information	Information Addr	ress Meeting Info Links Positions Billing Security PData Notes							
I≡ My Club Committees		Club Information							
E Club Leadership History	Encerthe Club information	n. The fields marked with * are required fields.							
E Club Statistics	Club Info:								
I≡ Club Member Map	*Club Name:	Lancaster (Level-7 change only)							
Club Badge Numbers	Club Badge Name:	Lancaster Shorter form of Club Name used on Badges (max 32 chars)							
RI Integration	*Club Number:	6202 Club Number (e.g., ClubID)							
■ Admin Functions <	Active:	Yes ~							
I≡ Setup	Club Parent:	[No Parent] (i.e., used when Rotaract, Interact and/or Satellite Club has a parent sponsoring club)	The information viewed by						
? Help Functions <	Club Type:	Rotary Club ~	clicking on Club Information is entered on the Address and						
My CLUB Shortcuts	*AREA:	Zlub Area /Region Number. Non-Regular Clubs should be 0.							
🛎 📝 🔜 🌽 🛞	Charter Number:		Meeting Info screens						
DISTRICT Shortcuts	Charter Date:	06/26/1940 (mm/dd/yyyy) - Charter Date - default is today please change	.						
0 🚉 🕞 🖂 🌌 🖤	EIN:	Optional Club Tax ID							
	Alt EIN:	Optional alternate or secondary Club Tax ID (e.g., club foundation)							
	Club Sponsor(s):	Chester Rotary Club Optional sponsor or parent club this club is associated with							
	Representative:	Optional Representative name							
	List Server Options:								
	List Server Name:	@DACdb.com							
	List Convex Delet	(Must be unique wihin Domain)							
	List Server RoleKeys:	(E.g., P=President, S=Secretary, T=Treasurer, PE=President-Elect)							

Updating Club Positions

To update club officers, board members and committee chairs from year to year:

- Log into DACdb
- Click on MY CLUB
- Click on Club Members
- Click on Edit Club
- Click on Positions

Home My DATA	My CLUB DISTRICT Support / Training						Rotary District 7750 - Lancaster	È	Maxfield, Regin
MY CLUB NAVIGATION	Club Admin: Lancaster (Club	#6202) id=6202							
E My Club Members <	Update the Club information below. Club offic	ers can be updated under t	the position t	tab.					Cancel View Update
E Member Cards									
■ Club Information		Tele Link I and				Natas			
	Information Address Meetin	g Info Link Pos	sitions	Billing Securit		Notes			
E Club Leadership History					Positions				
	This is a list of Club members and their po- screen, just click on the PENCIL 2 icon.	sition(s) in this Club. Memb	ers get adde	ed to this list by bein	g a member of	the Club (there is no ac	ld link here). Member positions wit	hin the Cl	ub can be edited from this
■ Club Statistics	Only Active and Staff Position members can he	old office. Others (e.g., Honor	ary) are not c	on the list below.					
■ Club Member Map									
Club Badge Numbers	Listing Options:						p-Up blockers must be disabled)		
RI Integration <	Show: Only members wi	-				Leadership History:	Click Here		
■ Admin Functions <	OrgYear: 2021-22 > Show p	ositions for this OrgYear				Position Summary:	Click Here		
≡ Setup									
? Help Functions	55 members								
My CLUB Shortcuts	Edit Club Member	MemberType	S-Lvl	2021-22 Positio	ns				
	- A -								
曫 🕃 🦊 🖾 🐔	🖉 Ardrey, William	Active	1						
DISTRICT Shortcuts	- B -								
3 🚉 🕒 🖾 🚧 🖤	🖉 Bailey, Bobby E.	Active	4	President (P)					
	Band, Richard A.	Active-R85	4	Literacy Chair (L)					
	Blackham, Gary R.	Honorary	2						
	Bohonak, Noni M.	Active	1			(
	🖉 🖉 Evykin, Eddie C	Active	2	Chaplain,Rotaract	Club Sponsor	(ROI)			
	A second second Andreas	A shiring	4			(//(01/)			
	A Brockmann, Andreas	Active Active P85	1						
Click on the	Bundy, Charles A.	Active Active-R85	1						
	Bundy, Charles A.	Active-R85	1			(,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			
pencil beside	 Bundy, Charles A. C - Carter, Leonard Hewell Jr. 	Active-R85 Active	1						
pencil beside	 Bundy, Charles A. C - Carter, Leonard Hewell Jr. Cauthen, Hazel R. Jr. 	Active-R85 Active Active-R85	1	Rotaract Club Soc					
	 Bundy, Charles A. C - Carter, Leonard Hewell Jr. Cauthen, Hazel R. Jr. Collins, Robert H. Jr. 	Active-R85 Active Active-R85 Active-R85	1 1 1 2	Rotaract Club Spc					
pencil beside the member who holds a	 Bundy, Charles A. C - Carter, Leonard Hewell Jr. Cauthen, Hazel R. Jr. Collins, Robert H. Jr. Croston, Emard Jr. 	Active-R85 Active Active-R85	1	Rotaract Club Spc					
pencil beside the member who holds a new club	 Bundy, Charles A. C - Carter, Leonard Hewell Jr. Cauthen, Hazel R. Jr. Collins, Robert H. Jr. Croston, Emard Jr. D - 	Active-R85 Active Active-R85 Active-R85 Active	1 1 1 2 1	Rotaract Club Spc					
	 Bundy, Charles A. C - Carter, Leonard Hewell Jr. Cauthen, Hazel R. Jr. Collins, Robert H. Jr. Croston, Emard Jr. 	Active-R85 Active Active-R85 Active-R85	1 1 1 2	Rotaract Club Spc					

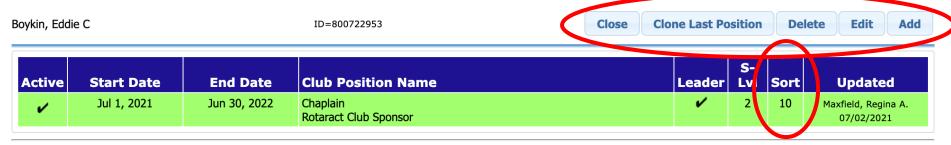


Club Position Administration

dacdb.com/Club/Admin/ClubPositionAdmin.cfm?UserID=800722953

Club Position Admin: Lancaster

Manage your Club position here. Click [**Edit**] to change or add new roles to position(s) that are already defined for a given time period. Click [**Add**] to add a new position in a different time period (in most situations this would be in a new OrgYear period).



Active position -- Current member position in use

LP (Leader Position) - Check this if you want the position shown at the top of the #SESSION.ClubLabel# listing.

S-LvI (Security Level) - Security level for this postion (e.g., 4 is #SESSION.ClubLabel# officer). You cannot grant a security level higher than your own.

Sort (Sort Position). - Affects the leader position sorting sequence, lower numbers sort first.

Use the blue tabs to Add, Edit or Delete a member's positions within the club. If the member is going to hold the same position in the new year as in the last, simply click the Clone Last Position tab.

The members who hold positions are the ones whose photos are displayed above the list of members when you access Club Members. Use the Sort field to control the order in which these members/positions are displayed (e.g. the President would be assigned Sort #1; the President-Elect would be assigned Sort #2; the Immediate-Past President would be assigned Sort #3). The order is completely up to you/the club.

Appendices

Action Items for the New/First-Time Club Secretary

Prior to July 1:

- Become familiar with the information in the Learning Resources (refer to slides #3 – #6)
- Meet with the outgoing secretary and receive club records
- Create a My Rotary account on my.rotary.org if you don't already have one

Action Items for the New/First-Time Club Secretary

Prior to July 1:

- Familiarize yourself with my.rotary.org
- Familiarize yourself with DACdb
- Meet with the incoming board of directors to determine preferred method of meeting notification, etc.

Secretary's Responsibilities -Board Meetings

- Send out meeting notifications prior to meeting
- Take minutes during meeting (a Smart Phone recording works wonderfully)
- Report on Club Performance
 Recent attendance percentages
 Members who are routinely NOT attending

Secretary's Responsibilities -Board Meetings

- Report on Club Performance (continued)
 - Membership net gain/loss
 - Member resignations with reasons given
 - New member proposals

 Draft minutes of meeting to have available for ratification at next board meeting if possible, but no later than 30 days following the meeting

Secretary's Responsibilities -Club Meetings

- Manage name badges (add new badges for new members and remove badges of terminated members)
- Record attendance

 Provide proof of make-up for visiting Rotarians

Secretary's Responsibilities -Club Meetings

- If not delegated to Treasurer, collect payment for meals
- If not delegated to Programs Committee or Sgt At Arms, assist speaker with set-up

Secretary's Responsibilities -Financial

If not delegated to Treasurer:
Collect for meals at each club meeting

- Invoice members for dues
- Follow up with members who have not paid their dues

Secretary's Responsibilities -Financial

If not delegated to Treasurer:
Notify the board of directors of extreme past-due cases

 Pay RI semi-annual dues invoiced in July and January

Pay District annual dues invoiced in July

Secretary's Responsibilities -Weekly

- See Secretary's Responsibilities Club Meetings
- Email reminders of meetings to members
- Assist with preparation of meeting agenda
- Assist with preparation of weekly bulletin

Secretary's Responsibilities -Monthly

Prepare for and attend Board Meeting

 See Secretary's Responsibilities – Board Meetings

If not delegated to Treasurer, prepare monthly financial reports

Secretary's Calendar June

- Make sure club membership is accurate in preparation for July 1 RI semi-annual invoicing:
 Make sure new members are added
 Make sure terminated members are terminated
- Use Member Compare in DACdb to reconcile member data in the two databases

Secretary's Calendar July

- Identify members who are eligible for Rule of 85; see Attendance Rule of 85 slides
- Include election of Honorary members in monthly board meeting; Honorary members are NOT counted in total membership, attendance or dues calculations

Secretary's Calendar August

If not delegated to Treasurer:
Pay club's semi –annual RI dues (usually invoiced by the end of July)

Pay club's annual District dues (usually invoiced by the end of July)

Secretary's Calendar September

 Remind President and President-Elect to begin preparing for election of officers in December (which means slate of officers needs to be presented to club members in November)

Secretary's Calendar September

Slate of Officers to be elected in December:

- Next year's President (President-Elect)
- Next year's President-Elect (President Nominee)
- Next year's Secretary
- Next year's Treasurer
- Next year's Sgt At Arms

Secretary's Calendar October

If not delegated to Treasurer and/or accountant, begin preparing the club's tax return (Form 990) which must be filed no later than November 15th.

Secretary's Calendar November

- If not delegated to Treasurer, ensure tax return (Form 990) is filed by the 15th.
- Remind President that nominations for next year's Club Officers and Board of Directors must be presented to the club this month (prior to a club assembly to formally elect the nominees in December)

Secretary's Calendar December

- Take minutes at club assembly held to elect next year's slate of officers.
- Update newly elected officers in DACdb (refer to slides Updating Club Positions)

Secretary's Calendar December

- Make sure club membership is accurate in preparation for January 1 RI semiannual invoicing:
 - Make sure new members are added
 - Make sure terminated members are terminated
- Use Member Compare in DACdb to reconcile member data in the two databases

Secretary's Calendar January/February

If not delegated to Treasurer, pay club's semi –annual RI dues (usually invoiced by the end of January)

Secretary's Calendar March/April

If applicable, assist President in applying for District Designated Grant. Application is due April 30.

Secretary's Calendar April/May

- Assist President with completion of Club Planning Guide. Guide is due May 15.
- If not delegated to Treasurer, work with President and board to develop next year's operating budget. Board needs to approve budget before it is presented to club members for approval.

Secretary's Calendar May/June

- Take minutes at club assembly held to approve next year's budget.
- See earlier slide Secretary's Calendar June

2022 Council on Legislation

Brand new changes affecting Secretaries as of July 1, 2022:

- Club boards now must provide meeting minutes to club members within 30 days
- Clubs no longer have to report monthly attendance to the District Governor

2022 Council on Legislation

 Club boards no longer have to approve Rule of 85 attendance requests by members

• For a complete set of adopted enactments:

www.rizones33-34.org/wp-content/uploads/2022/04/col22-adopted-legislation-en.pdg



District Secretary – Dave Knapp <u>Secretary@Rotary7750.org</u> District Administrator – Faith Line – <u>Admin@Rotary7750.org</u> IT Support – Terry Weaver – <u>ITSupport@Rotary7750.org</u>

Thank You for Attending!