RLI-HOA Event Registration & Close Out Steps (v1)
(Executive Summary)

120+ days prior --
The District includes projected RLI Events in their yearly Calendar. Suggest placing a "Save the Date" district-level event on the District's Calendar to promote future RLI event(s). (Use "District Event" as the Event Category in DACdb Calendar) Also include future RLI Events in District Newsletters, etc.

60+ days prior --

• District RLI Coordinator completes the RLI Event Budget Estimate to determine the appropriate RLI Fee to charge. Submit the Budget Estimate with Fee recommendation along with the desired RLI Event information to the RLI-HOA Registrar to get the RLI Event set up in the RLI-HOA DACdb Calendar (with registration open and visible to all HOA districts).
• Be aware of the RLI-HOA Registration, Cancellation, & Reimbursement Guidance.

Event Day --
Use the registration data collected in the RLI Event's Backroom in DACdb to assist with accurately checking and updating everyone's RLI participation and payment data.

Within 15 days after the RLI Event --
Partially close out the event by doing these registration updates in DACdb:

• Cancel the registration for those who did not complete their Part.
• Verify/correct the member profile and RLI Part; then enter a check mark in the Check-In column for those who did complete their RLI Part.
• "Post the Class" to add course completion to each deserving member's DACdb profile.
• Save or print the "Post Class" Confirmation window/page for your records and email a copy along with some brief summary comments about your event to the RLI-HOA Registrar.
• "Post the Class" only once! Make any future course completion corrections/additions manually as needed for this class.

Within 30 days after the RLI Event --
Finish closing out the event by doing these payment update steps:

• Verify/update the RLI Fee and Payment information for everyone registered in DACdb.
• For anyone who paid but did not compete, determine whether to retain their payment for a future event or refund their payment.
• Resolve all payment issues to achieve no amounts due and no refunds owed in DACdb.
• Submit the RLI-HOA Expense Report to the RLI-HOA Treasurer.
• Submit a copy of the RLI-HOA Expense Report to your Regional RLI Coordinator and the RLI-HOA Registrar.

Note: See the appropriate RLI-HOA Event Setup, Budget, Cancellation, or Close-Out Guides for more details. There are often special situations encountered with RLI Events. Don't hesitate to ask for assistance from your Regional Coordinator, the Registrar, or other RLI-HOA Leaders. Upon request, the Registrar will update the registration and payment data in DACdb for a District Coordinator.

RLI-HOA Questionnaire for Setting Up a New RLI Event (v5)

The District RLI Coordinator submits this information to the RLI-HOA Registrar to request their RLI event be set up on the DACdb Calendar. RLI event set up in DACdb is done at the RLI-HOA level, so each RLI event is visible and accessible to all RLI-HOA Districts on their DACdb Calendar and at **https://rlihoa.org/** . Once the RLI event is set up and registration is open, the District RLI Coordinator manages/conducts the event and then closes it out (with help from the RLI-HOA Registrar/Core Team as needed).

Please submit the following information to J.D. Rottero, RLI-HOA Registrar, at jdr56@comcast.net

Your Rotary District #: *please include your District # in subject line of all emails and correspondence.*
RLI Part(s) being conducted and class size **capacity** for each Part (maximum number of participants).

Day and dates for each day of the event.
Start time & time zone for each day (show up time or logon time for participants).
End time for each day.
Desired date to Open and Close Registration (we must manually open and close registration in DACdb).

For your long-range projected RLI events, it is a good practice to locally create a brief "Save the Date" District Calendar event in DACdb to begin promoting RLI. Just use "District Event" as the Event Category. Do not use "RLI Training Event" for your local District Calendar events. Once the details are known for your RLI event, submit this request to the RLI-HOA Registrar. Once the RLI-HOA event is set up, take down the local event.

Location address if in-person or just say virtual on Zoom or whichever platform is being used.
Virtual meeting information (if applicable). *Most districts include the Zoom meeting link (recurring) in the registration confirmation email each registrant receives. However, how you provide the Zoom link to your participants is your choice.*

RLI-HOA Fee to charge.
In-Person RLI Event - $60.00 per Participant per Part (*let us know if you wish to request a different fee*).
Virtual RLI Event -
  $15.00 per Participant, without printed materials (distribution by email).
  $30.00 per Participant, with printed materials (ordered from supplies and mailed to participants by the District Coordinator).
Checks should be made payable to RLI-HOA; online payments go directly to the RLI-HOA bank account.
Address to mail checks -or- payments may be accepted by card online only.

RLI Coordinator(s) or point of contact for the requested event – name, title/role, email, phone.
Is there anyone else you want to be a **Moderator in DACdb** for the event? *Moderators have access to manage the event in DACdb and may receive copies of the registration confirmation emails.*
List of Facilitators (*this can be added later*).

Any special instructions or any special questions you may want to include in the registration.

Rotary Leadership Institute - Heart of America (RLI-HOA)
Event Budget Guide and Worksheet for 2023-2024

This guide and its attached worksheet provide RLI Budget and Participant Fee information to Districts for conducting RLI in the HOA Division during Rotary Year 2023-2024.

The "Standard" RLI-HOA Fee Schedule for each Participant, per RLI Part, in 2023-2024 is as follows:
 Virtual event w/o materials = $15
 Virtual event w/ materials = $30
 In-Person event w/ materials = $60

A "convenience fee" when paying by card online will no longer be charged when using the Standard RLI Fee Schedule.

This RLI Fee Schedule is built to provide approximately enough income to cover the expected costs of conducting RLI events including the administrative costs of the RLI-HOA organization.

Because the costs of conducting in-person RLI events sometimes vary significantly from district to district, using a higher or lower Fee for a specific RLI in-person event may be approved if requested and justified by the District RLI Coordinator. Ideally, RLI Events should cost no more than the total of the RLI Participant Fees charged times the number of paying participants. This overall event cost must include all the local reimbursable expenses (reimbursable by RLI-HOA) plus the expenses direct-billed to RLI-HOA for supplies and materials and the standard administrative expenses incurred by the RLI-HOA organization. The attached worksheet may assist the District RLI Coordinator in estimating the expenses and income for a RLI event.

To assist all of us in keeping RLI Fees as low as practical while covering our overall actual expenses, we are asking the District RLI Coordinator to submit a completed "Event Budget Worksheet" for each in-person RLI event planned. We know districts must make several assumptions in making their event budget estimate as an early step in getting their RLI event on the calendar with registration open. The purpose here is to just get an estimate of what the RLI Fee should be for the planned event. We believe a $60 Fee will cover the expenses of most in-person events. However, if there is a high venue rental cost or high food and drink costs, then a higher Fee may be needed.

As an alternative to setting a higher in-person RLI Fee, a District may choose to internally cover the higher costs instead of raising the RLI Participant Fee.

If the District Coordinator occasionally orders a large quantity of supplies & materials to support multiple events (and possibly save on shipping costs overall), then it is appropriate to use a prorated amount of expenses from the large order spread over the RLI events supported. This may provide a more reasonable cost per participant and per event.

Attached is a simple RLI Event Budget Worksheet to submit with a request to open registration for an in-person RLI event.

RLI-HOA "In-Person" Event Budget Worksheet for 2023-2024

District # _____   RLI Coordinator: _____   RLI Event Start Date: _____   Parts: I II III Grad

circle planned parts

Estimated Expenses		Estimated RLI Fee Income	
Venue Rental	$	Estimated Number of Paying Participants:	
Food & Drink	$	X Planned RLI Fee:	$
Travel Costs for Faculty from outside your District	$	**Equals Total Fee Income:**	$
Supplies & Materials ordered from RLI-HOA Supply, including shipping (direct-billed). *($15 per Participant is typical when providing a notebook for Part I and paper curriculum to all)*	$	**Total Estimated Expenses divided by Estimated Number of Paying Participants =** *(Estimated Fee needed to cover costs)*	$
RLI-HOA Organizational/Admin Costs *($10 each for all Participants [Fixed])*	$		
Reimbursable Printing (Purchased Locally)	$		
Reimbursable Supplies (Purchased locally)	$		
Reimbursable Mailing Costs	$		
Other essential reimbursable costs	$		
Estimated Total Reimbursable and Direct-Billed Expenses:	$	**RLI Participant Fee Requested:**	$

Comments *(please comment on higher or lower than normal reimbursable/direct-billed expenses or special situations):*

RLI-HOA Registration, Cancellation, & Reimbursement Guidance

RLI Event Registration:
Participant registration for all RLI-HOA events will be done in the RLI Event posted in DACdb as set up by the RLI-HOA Registrar, as requested by the District RLI Coordinator. Participants may register by opening the desired event in their DACdb Calendar, or on the [RLI-HOA website](), or by using the registration invitation link that may be provided by the district conducting the RLI event.

Registration Cutoff Date:
1. For in-person RLI events, registration will normally close by four days prior to the event.
2. For virtual RLI events, registration will normally close by two days prior to the event.

RLI Coordinators may set and advertise a different registration cutoff schedule and may allow late registrations based on extenuating circumstances.

Payment Methods for RLI Events:
1. Paying online with a bank card or by ACH (electronic check) either during registration or by the registration cutoff date is the primary payment method. Online payments are processed through "Team Merchant" and go into the RLI-HOA bank account.
2. Paying by a club or personal check may be acceptable, at the discretion of the RLI District Coordinator. Mail or deliver RLI Fee payment checks to the RLI Coordinator by the registration cutoff date.

RLI Coordinators may accept late payments, at their discretion, based on extenuating circumstances.

Cancellations:
1. Registered participants who need to cancel their registration may do so online using one of the registration methods. Otherwise contact the RLI Coordinator to request cancellation.
2. Registered participants must cancel by the registration cutoff date to be eligible for their RLI fee payment to carry over as a credit for a future RLI event, or upon request, a refund less any fees may be made.

RLI Coordinators may allow late cancellations based on extenuating circumstances.

Refunds:
1. Participants who are registered for an RLI event but become unable to participate, and who cancel their registration by the event's registration cut off date, are eligible for their RLI fee payment to carry over as a credit for a future RLI event, or upon request, a refund less any fees may be made.
2. Participants should submit their request for a credit for a future RLI event or request a refund to the RLI Event's Coordinator within 10 days after the event. A refund will not be automatically issued.
3. RLI Fee refunds are normally by check in the mail from the RLI-HOA Treasurer, when requested by the District RLI Coordinator.
4. No refunds or credits will be granted if the cancellation is late (after registration cut off date) or the participant just does not show up at the event.

RLI Events require extensive preparation. Late cancellations and "no shows" have a significant negative impact on the event for all involved. Therefore, following the established timeline for registrations, cancellations, and potential refunds is essential to a district's RLI Program success. RLI District Coordinators may allow exceptions based on extenuating circumstances.

How to Document the Results of an RLI-HOA Event

During the RLI Event:

   Record who is present (for all sessions), verify their correct RLI Part, verify/update their RLI Fee and Fee Payment status, and if they had registered as a "Guest", record what club they are in. Most districts use a paper Check-In Roster to record this data during the event. There is an electronic Check-In tool and a printable Check-In report available in the DACdb RLI Module.

After the RLI Event, there are three main tasks to accomplish to "Close Out" the event:
1. Update the Registration information in DACdb which among other essential actions includes:
    a. Cancelling the registration for those who did not complete their Part.
    b. For those who did complete their RLI Part, verifying/correcting their registration details, then "Checking-In" and "Posting the Class" to update their RLI History in their DACdb member profile.
2. Verify/update the RLI Fee and Payment information for everyone registered.
3. Submit the RLI-HOA Expense Report to the RLI-HOA Treasurer, whether any reimbursement for the event's local expenses is needed or not.

The outcome of doing these three tasks in a timely manner ensures the following:
1. Everyone who completed their RLI Part is credited with that accomplishment. This is recorded in the RLI Tab of their member profile in DACdb.
2. The registration for everyone who did not complete their Part is "Cancelled" and they do not receive RLI credit.
3. Everyone's registration Payment Status in DACdb is updated with no remaining "Amounts Due". All RLI Fees are collected and recorded. Any refunds and other payment issues are resolved.
4. The Income portion of the RLI-HOA Expense Report matches the total net payments as listed in the event's registrations. The Income portion of this Report also matches the total of all Fee Income received (prepaid online and checks minus refunds).

RLI Coordinators may do the Event Close Out Tasks by any of the following methods:
1. Do all the tasks yourself and send the Registrar an email letting us know these Close Out tasks are done.
2. Do the tasks yourself that you feel comfortable doing and send the Registrar the necessary event information to finish updating the Registration and Payment entries in DACdb.
3. Submit the necessary event information to update all the Registration and Payment entries in DACdb to the Registrar and we will update DACdb for you. Once DACdb is updated, the Registrar and the District Coordinator will review the results together to confirm the event is accurately closed out. The district will still need to submit the Expense Report to the RLI-HOA Treasurer (whether reimbursement is needed or not).

Details for Documenting the Results of an RLI-HOA Event

Registration Close Out Steps and Things to Know:

- Please remember that after the RLI event's start date, the event no longer shows up on the RLI Dashboard page. You will find all RLI events, past and future, in the DACdb Calendar, "List Year" view. Hit the "Manage Event" button to get into the event administratively so you can continue to manage and close out your event.
- Registration and Payment Status updates are done in the RLI event's "Backroom".

1. Ensure every RLI participant is registered in their own DACdb member profile. For anyone registered as a Guest, edit their registration, and use the "Change Member" link to tie their registration to their own member profile. If someone's DACdb member profile cannot be found, ask for help. If someone does not have a DACdb member profile yet, ask their club to add them as a member in DACdb. It is best for several reasons for the Club Secretary or an officer in their club to be the one to add them as a member in DACdb. There should not be anyone left who is registered as a Guest, whether they completed their RLI Part or not.
2. Change the registration status to "Cancelled" for anyone who did not complete their RLI Part (for any reason). Do not use the "No Show" registration status choice.
3. For everyone who completed their RLI Part:
   a. Ensure they are registered for the correct RLI Part.
   b. "Check them in" by entering a check mark in the Check-In column. While the Check-In column is very important, know that it only serves as a visual indicator of who was marked present and deserves credit for completing their RLI Part. A check mark in this column has no other effect and by itself causes no action in the RLI Module.
4. "Post the Class" – After confirming the three steps listed above are completed, hit the "Post Classes" button (only once). A "pop up" window should appear listing everyone whose RLI History was just updated. Save a screen shot or print of this "pop up" window's information for your records. Ensure this list includes everyone deserving RLI completion credit and that it does not include anyone whose registration is cancelled. RLI participants need their RLI History updated in their member profile to be eligible to register for their next RLI Part. This completes the registration portion of Closing Out an RLI event.

- Only hit the "Post Classes" button one time. Every time the Post Classes button is hit, another RLI class completion is added for the members with active registrations.
- Do not change the check marks in the Check-In column after you hit the Post Classes button.
- If anyone's RLI History needs to be updated or corrected later, make that correction manually in the RLI Tab of the person's DACdb member profile.
- Do not delete (Red X) anyone's registration unless the Registrar agrees with that action.

RLI Fee and Payment Status Update Steps and Things to Know:

1. As necessary, edit each registration to update the RLI Fee charged and the Payment Status. Everyone's registration should end up showing a "Zero $$ Amount Due" unless they have a refund pending or other special payment situation (to resolve later but soon).
2. Here are two common scenarios for those who registered and paid online but did not complete their RLI Part; therefore, their registration was cancelled:
    a. Their RLI Fee Amount should be zeroed out if they want and are due a refund. Edit their registration and hit the "Reset Questions" button to zero out the RLI Fee Amount. This will result in a negative $$ amount in the "Amount Due" field which represents a refund is due.
    b. Their RLI Fee and Payment can be retained if they plan to participate in a future RLI event. Their registration (with its payment information) can be moved to a future RLI event, and their registration set back to an active status.
3. Update the registrations for payments by check. Include Check # and an appropriate Note.
4. Record a refund by entering a negative amount for the refund and an appropriate note, thus leaving an audit trail. This should zero out the "Amount Due" (except for the "Handling Fee").

- Eligibility to receive a refund will depend on the RLI-HOA or District level Cancellation & Refund Policy (once those policies are published).
- Normally, cancelled registrations are not deleted, especially for registrations containing online payments. Online payments must be preserved along with any refund information and notes.
- Submit the RLI Expense Report with copies of reimbursable expense receipts and any fee payment checks (all in one package) to the RLI-HOA Treasurer, PDG Frank Bradshaw, within 30 days after the event, whether any reimbursement is needed or not.

Special situations and Other Things to Know

- **Cancelling or Postponing an entire Event**. If, for any reason, a district needs to cancel or postpone an event, contact the Registrar to discuss options and plans. Options may include:
    - o The event's date may be changed to a future date thereby moving the entire event with its registrations and payments to the new date.
    - o If not changing the event's date yet, all registrations should normally be cancelled (at least temporarily), and the event set to an "Inactive " status.
    - o RLI Fee Amounts and Payments may be updated, as needed, for each participant as previously described depending on whether the payment will be retained for a future event or refunded.
- **RLI History Records and Manual Updates**. The official RLI History for a member resides in the RLI Tab of the member's profile in DACdb. District RLI Coordinators are responsible for keeping this RLI History in DACdb current and accurate for all the Rotarians in their district. Only District and higher RLI Coordinators have the authority and access to update someone's RLI History in DACdb. When making manual additions, deletions, and corrections to a member's RLI History, it is the best practice is to use the RLI Event's Name as listed in DACdb for the location field.
- **RLI Participants from Other Rotary Zones**. If anyone registered is from a club outside of Zones 30 and 31, then Posting the Class will not update their RLI History since our DACdb RLI system is only connected to districts and clubs in Zones 30 and 31 (Heart of America). District RLI Coordinators will likely be unable to manually update the RLI History for those participants. Districts will need to inform those participants' district or club leadership of their RLI accomplishment so the "home" district or club can record their member's RLI accomplishment in their system.

Deadlines for Closing Out an RLI-HOA Event

Within 10 days after the RLI event - If the District Coordinator is asking for help with updating the registration data and "Posting the Class" in DACdb, please submit the event's registration related data to the Registrar.

Within 15 days after the RLI event, if the District Coordinator is closing the event out themselves:
1. Update the registration information in DACdb which includes Cancelling those who did not complete; and Checking-In and "Posting the Class" for those who did complete.
2. Send the Registrar an email reporting that the registration related Close Out tasks are done.

Within 30 days after the RLI event, if the District Coordinator is closing the event out themselves:
1. Finish updating the RLI Fee and Payment information in DACdb.
2. Send the Registrar an email reporting that the payment related Close Out tasks are done.

Within 30 days after the RLI event, whether you closed the event out yourself or received assistance:
1. Submit the Expense Report to the RLI-HOA Treasurer, PDG Frank Bradshaw, with copies of reimbursable expense receipts and any fee payment checks (all in one package), even if reimbursement is not needed.
2. Email the Registrar a copy of the RLI-HOA Expense Report (the completed form only).
3. Email your Regional RLI Coordinator a brief summary of the outcome of your RLI event along with a copy of the RLI-HOA Expense Report (the completed form only).

The RLI Event Close Out steps must be done in a timely manner for three reasons:
1. To ensure our Rotarians are properly credited with their RLI accomplishments.
2. Keep our RLI History database current so we can all manage our RLI Program properly.
3. To avoid unnecessary DACdb registration fee charges.

How to Submit an RLI Event's Results to the Registrar for update in DACdb

We understand there is a wide range of DACdb familiarity and experience across our RLI Districts in the Heart of America. Doing "advanced registration" tasks in DACdb only occasionally can be challenging. Therefore, we are happy to assist you in any way and to even enter your RLI event's results into DACdb to "close out" your event for you.

District Coordinators may submit their RLI event's results to the Registrar via email in any reasonable file, format, or method. Using the attached RLI Event Close Out Worksheets or something similar may be a good way to share the information with the Registrar. When reading the Close Out Worksheets:
- The items with a GREEN column heading are for the District Coordinator to provide.
- The items with a BLUE column heading are for the Registrar to complete if the district asks for that assistance. These Worksheets are available as pdf and as an Excel file.

Please submit your questions, suggestions and your RLI Event Results to J.D. Rottero, RLI-HOA Registrar, at jdr56@comcast.net

RLI Participant's NAME	Completed their Part? Yes or No	IF Did NOT Complete, Cancel Registration	IF Registered as a Guest, What is Their Club's Name?	Guest Registrations Corrected?	Registered in Correct RLI Part? Yes or No	POSTED the CLASS	Event is Closed Out? Regarding Registrations

District #:		RLI Event Start Date:		RLI Coordinator:		
RLI Participant's NAME	**PAID?** Yes or No	**How Paid?** Online or Check or Credit Applied	**IF Paid and Did NOT Complete,** Hold $$ or Refund?	**Resolved Money Questions & Issues**	**Updated Payment Status**	**Event is Closed Out?** Regarding Money