# SUMMARY INFORMATION FOR ROTARY INTERNATIONAL DISTRICT 5080

## Why DACdb?

DACdb started in 2003 and built from the ground up to support the Rotary community. The product is continuously enhanced by listening to our customers and adapting the system to meet their needs.  Our goal is to make it easy for you to do your job!

## What makes us different?

*Innovation*. DACdb was the first vendor to work with Rotary International (RI) to develop the interface for seamless member and club information integration. DACdb is continuing to push RI for additional interfaces for Grant and Engagement integration. DACdb is the first to offer an Engagement module – combining Attendance and Service Project tracking.

- Membership Lead Management (a CRM system) that can be used to manage potential/prospect member leads.  Includes the ability to download and import the RI membership leads.
- Online *club assignment* module for club meeting task tracking
- District, Club and Event Financial system. More than club dues – a full double-entry accounting system for all clubs and the district to use, that is now integrated with Events.
- Personalized E-Mail with Analytics. DACdb offers all its customers the ability to send unlimited emails at no cost to club, committee, event (registered members, non-registered members), District and Zone members. This includes many filters and options to subset or drill down into specific lists. Emails sent are tracked for bounces and reads and links are tracked for clicks.
- Club officer changes entered by the club automatically roll up to district committees, and also to Rotary International.
- Automated nightly birthday emails from the DG, new member emails and sponsor emails.

*Support:* The DACdb team is 13 members strong. Included in the 13 members, we have two District Admins, two PDGs, three involved in Zone Leadership, 1 DGND and five Rotarians. We know the business, and two of the team members have been involved since its inception. We answer emails on weekends and, in many cases, late into the night. Customer support is our number one priority.

- Live weekly 20-minute trainings with 10 minutes of questions offered to all members. All sessions are recorded and available for viewing 48 hours after the training.
- Quarterly DCO (District Communication Officer) user group meetings
- Yearly day long Secretary training.

*Enhancements:* The DACdb team reviews requests from our users every week and continues to rollout enhancements to make your job easy – saving you hundreds of hours of work. For example, club member invoices can be generated and sent out in 14 mouse-clicks – literally minutes, not hours, using the Finance Module. Weekly club assignments can be managed using the Club Assignment module.  Being able to deliver enhancements users need is a huge differentiator from our competitors.

*Cost:*  The District pays – and ALL the clubs use DACdb for free.  No complicated pricing model for clubs.  Clubs can elect to pay for one of the premium extensions:  Finance, Engagement/Attendance, Survey, Website – if they want or need them.  Many clubs don't want any (or all) of these options and thus do not have to pay. The overall cost for the District is typically significantly lower than competitor products.

*Performance.* We value your time. Our goal is to deliver, over the day, an average transaction response-time under 100 milliseconds (1/10 second) per request measured at the server. A significant effort is put into page optimization and query tuning, so you are not waiting on us.

## CORE Features

*The following core features are available to all clubs:*

- ✓ Club Member Management
- ✓ RI Direct Integration
- ✓ Committees (unlimited)
- ✓ Monthly Attendance
- ✓ Unlimited PMail (email)
- ✓ Event Calendar
- ✓ Event Registration
- ✓ Resource Manager
- ✓ Reports - ~75 reports

- ✓ Dashboard
- ✓ ezStory
- ✓ EzBulletin
- ✓ Club Map of Members
- ✓ District Maps
- ✓ Photo Gallery
- ✓ Member Polls
- ✓ File Storage -Public and

- ✓ DACdb Mobile
- ✓ Ignite Management
- ✓ Awards
- ✓ CRM (Prospect Management)
- ✓ Speaker Module
- ✓ Club Assignments
- ✓ Secure

*Premium Add-On Extension Modules (Optional)*

Optional fully integrated modules for **clubs**:
- Engagement/Attendance – attendance and service project hours tracking
- Finance – Easy to use Invoice / Accounting club and foundation accounts
- Website – Easy and Beautiful (no HTML knowledge needed) or WordPress websites
- Survey – club member surveys / polls, Event surveys

Optional fully integrated modules for **districts**:
- Finance – Easy to use Invoice / Accounting district, foundation, event, and club billing accounts
- Website – Easy and Beautiful (no HTML knowledge needed) or WordPress websites
- Survey – District surveys / polls, Event surveys
- Grants – Manage the club application, workflow, and approvals for obtaining District Designated Funds.
- RLI – Manage the RLI events – student registrations/payments, instructor assignments/ratings
- RYLA – Manage student applications, selection workflow, candidate selection and registrations
- YPP – Manage the district members youth protection program training/background check approvals

*Optional Extension Modules Summaries*

*Websites (Optional Extension Module)*

Easy and Beautiful

If you purchase an Easy and Beautiful website, we will enable our CMS (Content Management System) tool to assist you in bringing over the information that you want from your existing website.

We can provide limited assistance by uploading documents and images that you provide to us (ZIP file) from your existing website. You are responsible for gathering all the documents and images from your existing website and sending them to us to upload into the root of your new website. Your webmaster will be responsible for linking to those documents and images in your website.

We cannot accept website code files (e.g. html, php, js, css, etc.) nor multimedia files (movies, audio, etc.) per our Usage Policy.

WordPress

If you purchase a Wordpress website, these are your options and the development process:

Option 1 (We create and host the site):
1. Customer selects one (1) available theme as the basis of their website
2. Staging site is created based on selected theme
3. Admin credentials for staging site are given to customer so they can build out the site
4. Once site is ready, customer advises us to take the site live
5. Site is launched

Option 2 (Customer creates site and we host the site):
1. We will create the staging site
2. Admin credentials for staging site are given to customer so they can build out the site
3. Once site is ready, customer advises us to take the site live
4. Site is launched

In both cases above (options 1 and 2), we will perform periodic security updates to the WordPress core, nightly backups of the website.

Option 3 (Customer creates and hosts site and subscribes to Plugin service):
1. Customer subscribes to the WordPress plugin service
2. We send the customer the Short code Doc and a link to the Plugin for download
3. Customer will need to periodically update the plugin like any other WP plugin

*Website Domain Name (Optional Extension Module)*

The domain name is how your website is referenced on the internet – it's your address and your "identity" online (e.g. example.com). The question is: Who owns and manages the domain name?

In some cases, the club/district/organization owns the domain name and manages it. In other cases, a member or third-party organization owns and manages it.

The question for you to consider is: Do you want to have us manage, configure and renew your domain name – doing all the work – so you don't have to worry about it?  Your options are:

- <u>You Manage</u> - (no fee).  You manage your own domain, you renew it, and you are responsible for passing on access to those that manage it. You point and configure the DNS and zone files and records yourself.
- <u>We manage Yearly</u> - (per domain name fee applies). You subscribe to one of our domain name registration plans and we will configure, manage and renew your domain name(s). We do everything for you so you don't have to worry about a thing once we have control of your domain name(s). Each domain name requires its own subscription. *Note: The Domain Name is your property, even if we manage the domain on your behalf. Should you decide to move away from this option, we will transfer the domain back to your control as instructed.*

If your organization would like us to take over management of the existing domain name, your organization will need to host your website with us (see above) and purchase a Domain Name Registration subscription. Then, your organization will need to transfer the domain to us. For instructions on how to do this, please see the "Domain Name Transfers" help article under "Websites" on the "Support" tab in the DACdb/iMembersDB system.
If your organization purchases a website subscription from us, but choose to manage your own domain name, you can find general instructions for the configuration of your domain name in the "Domain Management" help article under "Websites" on the "Support" tab in the system.

### *Finance (Optional Extension Module)*

The Finance module is designed to manage your organization's invoicing and accounting needs via a user-friendly interface.   Each club/chapter can have one or more Finance accounts – and the main organization (e.g., District) can have their own Finance accounts.   This module allows for current financial information to be available at multiple access-points.  High security access lists limits access to only those authorized by your club/district/organization.  Generate and also email club/district invoices in a matter of minutes.  Track charges and payments for members, as well as bank accounts.  Set up and maintain fiscal year budgets.  The finance data can easily be exported to Quickbooks if desired by your accountant or auditor. Completely customizable features accommodate unique club/district needs. This product works very much like other online financial products for a fraction of the investment. It is well-worth your consideration. There are several Finance components included:

- ❑ Invoicing
- ❑ Accounting
- ❑ Budgeting
- ❑ Check Writing
- ❑ Vendors
- ❑ Reporting

Key features:
- ❑ Credit Card Payments – member payments can be made online through a third-party payment system (e.g. PayPal, Authroize.net, IPpay).
- ❑ Club/District can create their own branded or personalized custom invoice and statement templates
- ❑ Check Printing
- ❑ Bank Account reconciliation
- ❑ Easy Export to QuickBooks or Excel

### *Engagement (Optional Extension Module)*

It's well known and statistically verifiable that most members who resign from your organization first disengage from club/chapter activities. Whether members are attending meetings or not, keeping track of their engagement in other

activities is essential in identifying both engaged and effective members and also those who are drifting toward resigning.

- ❑ Online Engagement summary for District/Club
- ❑ Mobile device attendance and service hours entry *(Internet/cell/WiFi connection required)*
- ❑ Track by day the number of volunteer hours a member has logged and any cash contributions
- ❑ Track In-Kind hours and cash contributions
- ❑ Easy project importing process from Grants Module *(if the District subscribes)*
- ❑ Create meetings that do not count towards regular attendance.
- ❑ Members can add their make-ups online.
- ❑ Charges to members can be linked to the Finance module allowing for additional charges for guest meals or meal credits from missed meetings.

If you are interested in using Engagement, a list of your current projects will be necessary.  And to the extent possible, the details associated with each project.


*Grants Module – DACdb, Rotary-use Only (Optional Extension Module)*

The Grants Module allows districts and clubs to manage the internal application process when clubs apply for District Grant Funding (DDF). The Grants Module is designed to manage the entire lifecycle of the "District Grant" process.

Key features:

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| ❑ Grant Project Overview – Approved Requests | ❑ Customized Grant Application Form (by each District) |
| ❑ Budget Management | ❑ Secured File System for Grant Document Storage |
| ❑ Financial Reporting | ❑ Archive (Up to five (5) year-retention) |
| ❑ Grant Management | ❑ Workflow Processes |
| ❑ PMail Grant Project owners | ❑ E-Mail Notifications |
| ❑ Digital Signature Approvals | ❑ Grant Transaction Log |

If you are interested in using Grants, a list of all your current Grant projects will be required, along with the details behind each Grant.  Grant data cannot be imported at this time, so each open Grant will need to be manually entered.  Our support team can provide some assistance in this area.