



2020-2021 Rotary District 6940 Assembly – Secretary Training

Agenda

- ▶ Introductions-Club, Years in Rotary, one thing you hope to learn
- ▶ A Year in the Life
- ▶ DACdb and RI Training and Learning
- ▶ Tips & Lessons Learned
- ▶ Resources
- ▶ Wrap-up

Discussion Leader – Linda Nelson

- ▶ Area Governor – Area 8 2020-2021
- ▶ Tallahassee Sunrise
- ▶ Linda.Nelson31@gmail.com
- ▶ 850.321.2486





A YEAR IN THE LIFE OF CLUB SECRETARY

SUPPORT YOUR PRESIDENT & MEMBERS MAINTAIN CLUB ACCOUNTABILITY. RECORD KEEPING, REPORTING, ATTENDANCE, ENGAGEMENT, MEMBERSHIP, COMMUNICATION, MAINTAIN DACdb & ROTARY CLUB CENTRAL, TRAIN IN DACdb & RI.

JUNE	Clean-up Membership & Officers. Run Member & Officer Integration. RI-confirm goals are set.
JULY	Pay RI Invoice (sent email and in RI), record attendance and engagement in DACdb, manage membership, record Board Minutes. Maintain Club Bylaws, update RI Goals
AUG	Pay District Invoice (sent by email), record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals
SEPT	Pay DACdb fees (varies by club) record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals
OCT	Record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals
NOV	Record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals
DEC	Clean-up Membership & Officers. Run Member & Officer Integration. Record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals
JAN	Pay RI Invoice. Record attendance and engagement in DACdb, manage membership, record Board Minutes. update RI Goals
FEB	Record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals
MAR	Record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals
APRIL	Record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals
MAY	Clean-up Membership & Officers. Run Member & Officer Integration. Record attendance and engagement in DACdb, manage membership, record Board Minutes, update RI Goals. Train Sec. Elect
JUNE	Clean-up Membership & Officers. Run Member & Officer Integration. Prepare to hand over all Minutes, Records to Sec. Elect

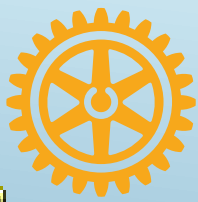




TIPS & LESSONS LEARNED

- ▶ Do not get behind – stick to the time task calendar
- ▶ Do not create a meeting or engagement activity until right before the meeting
- ▶ Enter Attendance during the meeting or immediately afterward
- ▶ Enter or have members enter make-ups immediately after events/activities
- ▶ With Board Approval, edit DACdb to support make-ups to 365 days, not 2 weeks
- ▶ Update Membership Records prior to meetings, as necessary – changes, adds, terminations (LOA, Rule of 85, etc.)
- ▶ Enter and Terminate members within 30 days
- ▶ Approve Banked Attendance immediately after meetings
- ▶ DO NOT match Banked Make-ups before entering attendance
- ▶ Check Pending Members weekly & coordinate efforts with Membership Chairs
- ▶ Run Integration after membership changes
- ▶ Update RI Goals & Take Action Tab - Rotary Club Central & Rotary Showcase
- ▶ Maintain & Monitor RI Manage Tab - Club Administration, Forms & Reports, Club Invoice





Resources

DACdb Training – HELP TAB

<ul style="list-style-type: none"> • <u>Attendance</u> 	<ul style="list-style-type: none"> ○ <u>Weekly Attendance</u>
<ul style="list-style-type: none"> ○ <u>Submit Monthly Attendance to District</u> 	<ul style="list-style-type: none"> ○ <u>Installing Barcode Fonts</u>
<ul style="list-style-type: none"> ○ <u>Make Ups</u> 	<ul style="list-style-type: none"> ○ <u>Send Pmail to Members Who Missed a Meeting</u>
<ul style="list-style-type: none"> ○ <u>Adding a new member to existing attendance list</u> 	<ul style="list-style-type: none"> ○ <u>Entering Excused Absences R0f85 and LOA</u>
<ul style="list-style-type: none"> ○ <u>How to delete a club meeting</u> 	<ul style="list-style-type: none"> ○ <u>How to edit things on a club meeting</u>
<ul style="list-style-type: none"> ○ <u>Integrating A Google Calendar</u> 	<ul style="list-style-type: none"> ○ <u>How to email your PEs who have not registered for PETS</u>
<ul style="list-style-type: none"> ○ <u>How to print or email yourself a confirmation</u> 	<ul style="list-style-type: none"> • <u>Engagement</u>
<ul style="list-style-type: none"> ○ <u>Engagement Full Documentation</u> 	<ul style="list-style-type: none"> ○ <u>Setup Service Projects</u>
<ul style="list-style-type: none"> ○ <u>Setup Attendance</u> 	<ul style="list-style-type: none"> ○ <u>Setup Security Access</u>
<ul style="list-style-type: none"> ○ <u>Enter Project Activity Video</u> 	<ul style="list-style-type: none"> ○ <u>General FAQ</u>
<ul style="list-style-type: none"> ○ <u>Engagement for Attendance v2</u> 	<ul style="list-style-type: none"> ○ <u>Engagement General User Guide v1</u>
<ul style="list-style-type: none"> ○ <u>Produce Barcode Labels or Badges</u> 	<ul style="list-style-type: none"> • <u>RI Integration</u>
<ul style="list-style-type: none"> ○ <u>Club Authorization to Initiate Data Integration Agreement - multi-vendor EN</u> 	<ul style="list-style-type: none"> ○ <u>Club Officer Compare May 2020</u>
<ul style="list-style-type: none"> ○ <u>DACdb University RI Compare June 2019</u> 	<ul style="list-style-type: none"> ○ <u>RI Integration Step By Step May 2020</u>





Rotary International Resources

My Rotary – Learning & References

- ▶ [Secretary of a Club Valuable Information](#)
- ▶ [Get Ready: Club Secretary](#)
- ▶ [Roles and Responsibilities of Club Secretary](#)
- ▶ [Pay or view your club invoice](#) (Rotary International dues and fees)
- ▶ [Update your club membership data](#)
- ▶ Set and track goals in [Rotary Club Central](#)
- ▶ Check our [discussion group](#) for club secretaries
- ▶ Rotary support
- ▶ Outgoing secretary
- ▶ Club and district leaders
- ▶ [Club and District Support representative](#)



Rotary Opens Opportunities



Wrap Up

Discussion Leader – Linda Nelson
Area Governor – Area 8 2020-2021
Tallahassee Sunrise
Linda.Nelson31@gmail.com
850.321.2486



Rotary Opens Opportunities