

# Club Secretary Training District 6400

**Meg Coughlin**

**Rotary Club of Detroit - Secretary & President Nominee**

**Myra D. Ford**

**Rotary Club of Detroit – President**



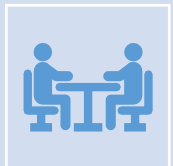
# One size does not fit all



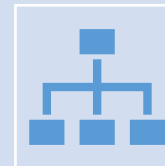
Review Club Bylaws for position description of club secretary



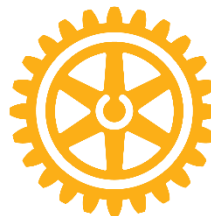
May be elected annually, or serve indefinitely



Ask outgoing or those serving previously for their input



Succession planning is key – are the records in order so they can be easily passed on



# ASSIST CLUB PRESIDENT

Every club has their own culture and history – learn it

Meet with the incoming President and Discuss How You Can Support

- The President

Identify the Club Jobs and Who performs them

Assignment of Responsibilities may differ from year-to-year

# Club Management Software-DACdb & Club Runner
















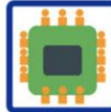










**DACdb** Home My DATA My CLUB DISTRICT Support Rotary District 6400 - Detroit Coughlin, Margaret

**MY CLUB NAVIGATION**

- My Club Members
- Member Cards
- Member Directory
- Club Leadership History
- NewMember Form
- Admin Functions
- Club Setup
- Help Functions

**DETROIT CLUB FUNCTIONS (#3031)**

Select a function. **Reposition** ICONS by dragging and dropping. **Remove/Add** ICONS using Configuration.  
✓ = The top 6 functions will **appear on the My CLUB Shortcuts menu** in the same order arranged here.

 <b>Find Member</b>	 <b>Club Members</b>	 <b>Club Committees</b>	 <b>PMail</b>	 <b>Club FILES (New)</b>	 <b>Club Bulletins</b>
 <b>Club ezBulletins</b>	 <b>Calendar</b>	 <b>Club ezStory</b>	 <b>RI Compare</b>	 <b>Club Finance</b>	 <b>Club Sponsors</b>
 <b>Club Attendance</b>	 <b>Club Engagement</b>	 <b>CRM</b>	 <b>eMeeting</b>	 <b>Club Information</b>	 <b>Club Assignments</b>
 <b>PText</b>	 <b>AREA</b>	 <b>Club Maps</b>	 <b>Reports</b>	 <b>Club Statistics</b>	 <b>Club Verify</b>
					

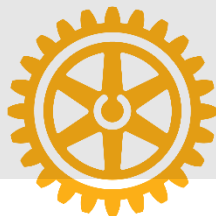
# Secretary's Checklist

## Club Jobs – Notices, Recording and Filing Agendas, Minutes, Attendance & Engagement

ROTARY CLUB JOBS - RECORDING AND FILING										
(Example)										
Job	Sub-category	Description	Secretary	Delegee	President	Delegee	Treasurer	P Elect	P Nominee	Committee Chair
Club Meetings	Agenda				X					
	Minutes	N/A								
Board Meetings	Agenda				X					
	Minutes		X							
Committees	Agenda									X
	Minutes									X
Attendance	Club Meeting			X Attendance Secy						
	Board Meeting			X Attendance Secy						
	Committee Meeting									X
	Event	TBD								
Engagement	Committee Meeting									X
	Grants									X
	Service Projects									X

# MAINTAIN MINUTES OF MEETINGS

- May include club, board and committees or any combination
- In general, minutes reflect who is present, date and what actions were taken (not verbatim conversations)



# Maintain membership records

- **Rotary Club Central – membership database**
- **Dues invoiced July 1 and**
- **January 1 based on membership**

# Adding Members



## Club Members

**DACdb** District and Club database

Home My DATA

**MY CLUB NAVIGATION**

- My Club Members
- Member Cards
- Club Information
- My Club Committees
- Club Leadership History
- Club Statistics
- Club Member Map
- RI Integration

**Admin Functions**

- Member Listing
- NewMember Form
- Edit Club
- Edit Club Positions
- Add New Member
- Member Transfer
- List ALL Clubs

Setup

**Help Functions**

**My CLUB Shortcuts**

**DISTRICT Shortcuts**

**DACdb** District and Club database

Home My DATA My CLUB DISTRICT Support

Rotary District 6400 - Detroit Coughlin, Margaret A.

**MY CLUB NAVIGATION**

- My Club Members
- Member Cards
- Club Information
- My Club Committees
- Club Leadership History
- Club Statistics
- Club Member Map
- RI Integration
- Admin Functions
- Setup
- Help Functions

**My CLUB Shortcuts**

**DISTRICT Shortcuts**

**Member Admin: New Member** id={new}  
D-6400 Detroit (#3031)

Cancel Add

**Member Information**

Member Photo Contact Spouse Business Club Login Bio/Notes

**Member Information:**

Rotary ID: 0 If former Rotarian, get RI Member ID# before continuing! Also known as "MemberID"

Member Type: \* [Select MemberType]

Prefix: [select]

First Name: \*

Middle Name:

Last Name: \*

Suffix:

Gender: \* Not Given

**Badge Information:**

Badge/Nick Name: (Only put in a Badge Name IF different from First Name)

Badge Title: Title you want to appear on Event Badges

Badge Number:

**Other Information:**

Club Start Date: \* (mm/dd/yyyy) Admission/Start Date in this Club  
If there are previous years in another club, enter those years under the Club Tab

Birth Date: Note: Rotary requires the Start Date (Date of Admission) to be within 30-days of the date of the date the member is being added (e.g., today).  
Note: Rotary will not accept a member with a birthdate < 18 years old.

Birth Place: Optional City, State where born

☐ Check to search for Sponsor across all Districts

<https://www.dacdb.com/Member2/memberAdmin.cfm?Action=A&ClubID=3031#>

**Rotary**  
District 6400



*illuminating*  
**HOPE**



# Record Retention and Government Reports

Job	Sub-Category	Notes	Secy	Delegee	Pres.	Delg. Treas.	PE.	PN.	Com Chair
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Record Retention									
	Governing Documents	DACdb –Club Files	X						
	Minutes	DACdb-Club Files	X						
	Club Awards	DACdb-Club Files			X				
	Club History	Book & Supp		X					
	Meeting Documents	DACdb-Club Files			X	X-Board			
	Committee Documents	Varies							X
	Tax Records	Treasurer				X			
	Election Results	DACdb-Club Files	X						
Government Reports	MI Annual Report	State-LARA				X			
	IRS 990	IRS				X			
	State Taxes	MI Dept Treasury							
	MI Solicitation Approval	MI AG’/Char Gaming	X						



## Club FILES (New)

### File Manager: Club Detroit Downloads

The file manager stores documents and images below. The documents can be organized under sub-directories (folders).

search..   

[Zip Download](#) [Delete](#) [Copy](#) [Move](#) [Add Folder](#) [Add Link](#) [Upload File](#)

**Public** **Secure**

Store **PUBLIC** files here that you would like ANYONE on the internet to be able to access. The files stored here **will be** indexed by search engines like Google, Yahoo, Bing, etc. **DO NOT** disclose member "personally identifiable information" in Public Files (e.g. E-mail addresses, Phone numbers and address data). If you want your file to only be accessible to members that have logged in - use the Secure Files tab. The maximum upload size of a single file is: 20 MB.

**NOTE: The following words are "reserved" and cannot be used in any File Name or Folder Name: CAST, DECLARE, CONCAT, SELECT, UNION**

Navigation: [Home](#) <<-- click links here to navigate

	Action	Type	File Name	Link	Modified	Size
<input type="checkbox"/>	 		Club Statements		2020-07-20 09:23:51 AM	0 KB

### File Manager: Club Detroit Downloads

The file manager stores documents and images below. The documents can be organized under sub-directories (folders).

search..   

[Zip Download](#) [Delete](#) [Copy](#) [Move](#) [Add Folder](#) [Add Link](#) [Upload File](#)

**Public** **Secure**






















Store files here that you would ONLY like logged members to be able to see. Members MUST login to see these files. The files stored here are ONLY accessible to users that have logged in to District 6400. They are NOT accessible to users on the internet, nor are they able to be linked to as webpages on other websites. Because of this, don't upload html files, url links, or other web content to these directories, as they may not be useable.

If you want your file to be accessible to the general public, have it linked on your website, etc. - use the Public Files tab.

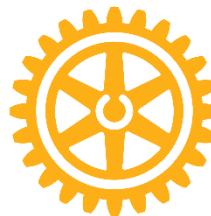
If you want to allow direct access to your file, you can click on the "link" hyperlink in the Link column to get a link to the file that will allow a user to authenticate (login) before they gain access to the file.

**NOTE: The following words are "reserved" and cannot be used in any File Name or Folder Name: CAST, DECLARE, CONCAT, SELECT, UNION**

Navigation: [Home](#) <<-- click links here to navigate

	Action	Type	File Name	Link	Modified	Size
<input type="checkbox"/>	 		Detroit Rotary Archived Minutes		2021-04-14 02:40:09 AM	8 KB
<input type="checkbox"/>	 		2020-2021 Board of Directors Meeting Artifacts		2021-04-10 08:44:15 AM	4 KB
<input type="checkbox"/>	 		Governing Documents		2021-03-22 11:05:44 AM	4 KB
<input type="checkbox"/>	 		Detroit Rotary Foundation		2021-03-17 09:56:07 PM	4 KB
<input type="checkbox"/>	 		Finance and Insurance		2021-03-04 01:37:53 PM	0 KB
<input type="checkbox"/>	 		Membership Committee		2020-08-03 02:08:24 PM	0 KB
<input type="checkbox"/>	 		Membership Applications		2020-08-03 02:03:18 PM	4 KB

**Rotary**  
District 6400



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**HOPE**

# Meeting Assistance

Job	Sub-Category	Notes	Secy.	Delegee	Presd	Delegee	Treas.	P Eect.	PN	Committees
On-Line	Website					Web Master				
	Calendar	DAC-db	X							
	Facebook					Facebook Editor				
	Twitter					Twitter Editor				
	Other Social Media	TBD								
Meeting Set Up	Zoom Invitations				X	<b>Member</b>				
	Facility Coordination				X	Set Up Lead				
	Equipment				X	Set Up Lead				
	Meeting Contracts					X				



## DACdb Secretary Training

### IN THE SUPPORT PAGE

#### Key Topics Covered

Use the **TABS ABOVE** to view the **FULL** course!

- [Introduction](#)
- [Login and Password Recovery](#)
- [Edit Club Positions](#)
- [Add and Terminate Members](#)
- [Committees](#)
- [Engagement and Attendance](#)
- [RI Compare](#)
- [Creating Events](#)
- [PMail](#)
- [Reports, Mobile App and Wrapup](#)
- [Secretary Question and Answer Session](#)

## District 6400 Help

Jim Karolyi

Phone: 734-502-4470

Email: [jkarolyi241114mi@comcast.net](mailto:jkarolyi241114mi@comcast.net)

Matt Hatty

Phone 734-552-2117

Email: [matt@funservicesmi.com](mailto:matt@funservicesmi.com)

**Rotary**  
District 6400



# District 6400 Secretary Training

## •Question & Answer



# ROTARY INTERNATIONAL (RI)

- Sync DACdb & Rotary International

The screenshot shows the DACdb web application interface. The browser address bar displays <https://www.dacdb.com/SecLogin3.cfm>. The top navigation bar includes links for Home, My DATA, My CLUB, DISTRICT, and Support. The user is logged in as Ford, Myra D. The main content area is titled "MY CLUB NAVIGATION" and lists various functions: My Club Members, Member Cards, Member DIRECTORY, Club Leadership History, NewMember Form, Admin Functions, Club Setup, and Help Functions. Below this, a grid of 24 icons represents different club functions, each with a green checkmark in the top right corner. A tooltip for the "RI Compare" icon states: "Manage your Rotary District 6400 information here". The bottom of the screen shows the Windows taskbar with the search bar and various application icons. The system clock indicates 5:39 PM on 4/16/2021.

https://www.dacdb.com/SecLogin3.cfm

Home My DATA My CLUB DISTRICT Support

Rotary District 6400 - Detroit Ford, Myra D.

MY CLUB NAVIGATION

✓ = The top 6 functions will appear on the My CLUB Shortcuts menu in the same order arranged here.

Find Member Club Members Club Committees Club Bulletins Calendar AREA

Club Assignments Club FILES (New) Club Attendance Club Information eMeeting Club Engagement

Club ezBulletins Club ezStory Club Finance Club Maps PMail

Reports RI Compare Club Sponsors Club Statistics Club Websites

Manage your Rotary District 6400 information here

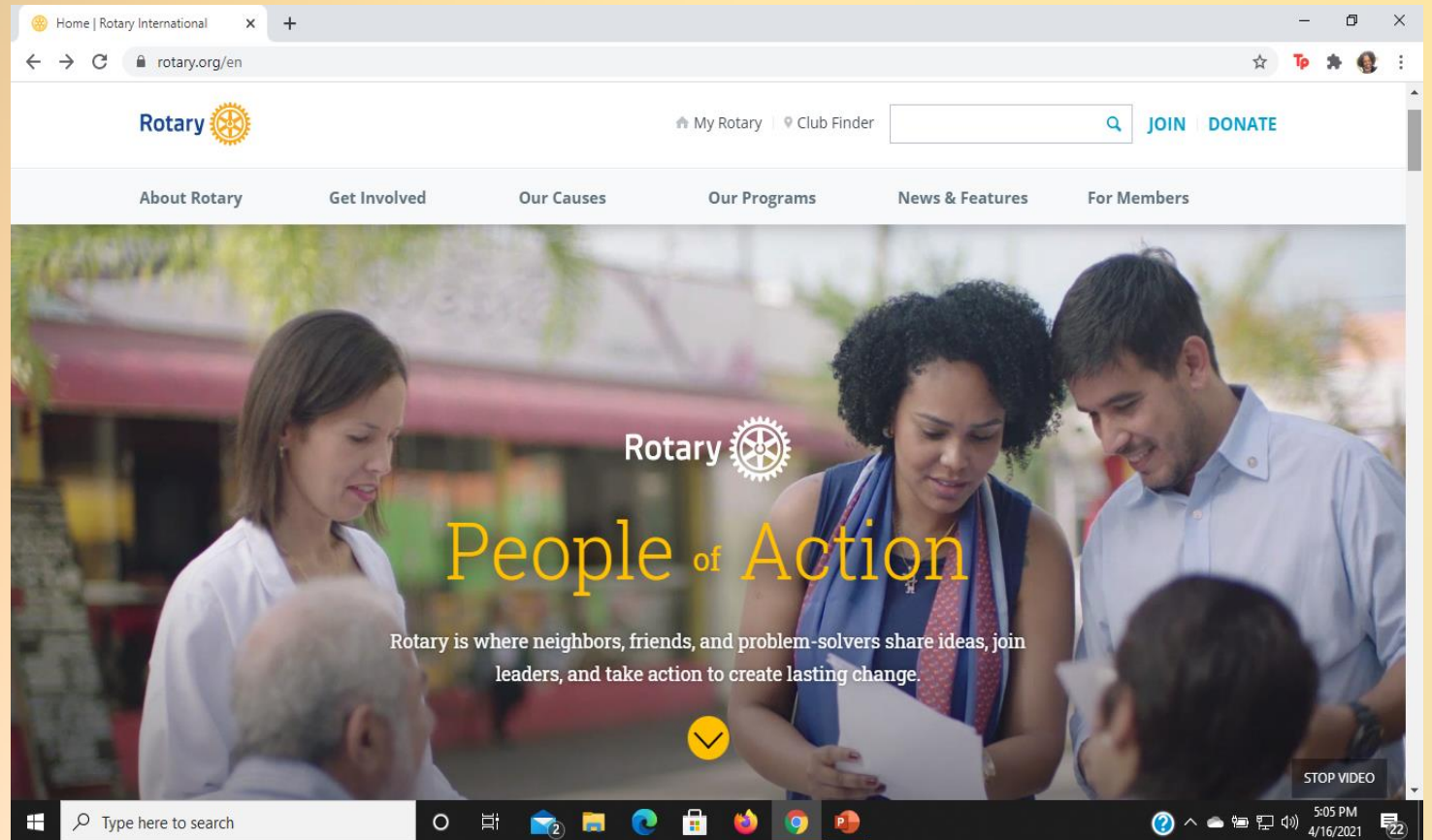
https://www.dacdb.com/Club/RICompare2.cfm?Type=Member&ClubID=3031

Type here to search

5:39 PM 4/16/2021

# ROTARY INTERNATIONAL (RI)

- **Sync DacDb & Rotary International**
- **RI Registration**
  - [My.rotary.org/login](https://my.rotary.org/login)
- **RI Access**
  - **Learning & Reference**
    - Learn by Role
    - Club Role



Secretary | My Rotary

my.rotary.org/en/learning-reference/learn-role/secretary

Rotary | My Rotary

HOME | EXCHANGE IDEAS | TAKE ACTION | **LEARNING & REFERENCE** | MANAGE | THE ROTARY FOUNDATION

Learn by Role > New Member

Learn by Topic > Club Roles

About Rotary > Trainers

Policies & Procedures > District Roles

Learning Center District committees

Webinars

**My Rotary scheduled maintenance**

My Rotary will be unavailable while we perform scheduled maintenance.

Friday 16th April 2021 from 11:00 PM to Saturday 17th April 01:00 AM CST (Chicago Time).

https://my.rotary.org/en/learning-reference/learn-role/club-roles

Type here to search

Secretary | My Rotary

my.rotary.org/en/learning-reference/learn-role/secretary

# Secretary

As club secretary you help your club run smoothly and effectively. You also monitor club trends to help identify strengths and areas for improvement, and share this information with club and district leaders.

## What you do

- Maintain membership records: [Update your club membership data](#). Your club invoice is based on the number of members in Rotary's database for your club as of 1 July and 1 January. Rotary International sends the club invoice by email and mail. Save paper by [opting out](#) of the paper (mailed) version.
- Maintain minutes of club, board, and committee meetings
- Work with incoming secretary to ensure smooth transition

## How to prepare

- Take online courses for club secretary in the [Learning Center](#)
- Attend district training assembly
- Work with outgoing secretary

## Resources & reference

- [Be a Vibrant Club: Your Club Leadership Plan](#)
- [Standard Rotary Club Constitution](#)
- [Recommended Rotary Club Bylaws](#)

What do you want to do?

I want to...

f t in e p

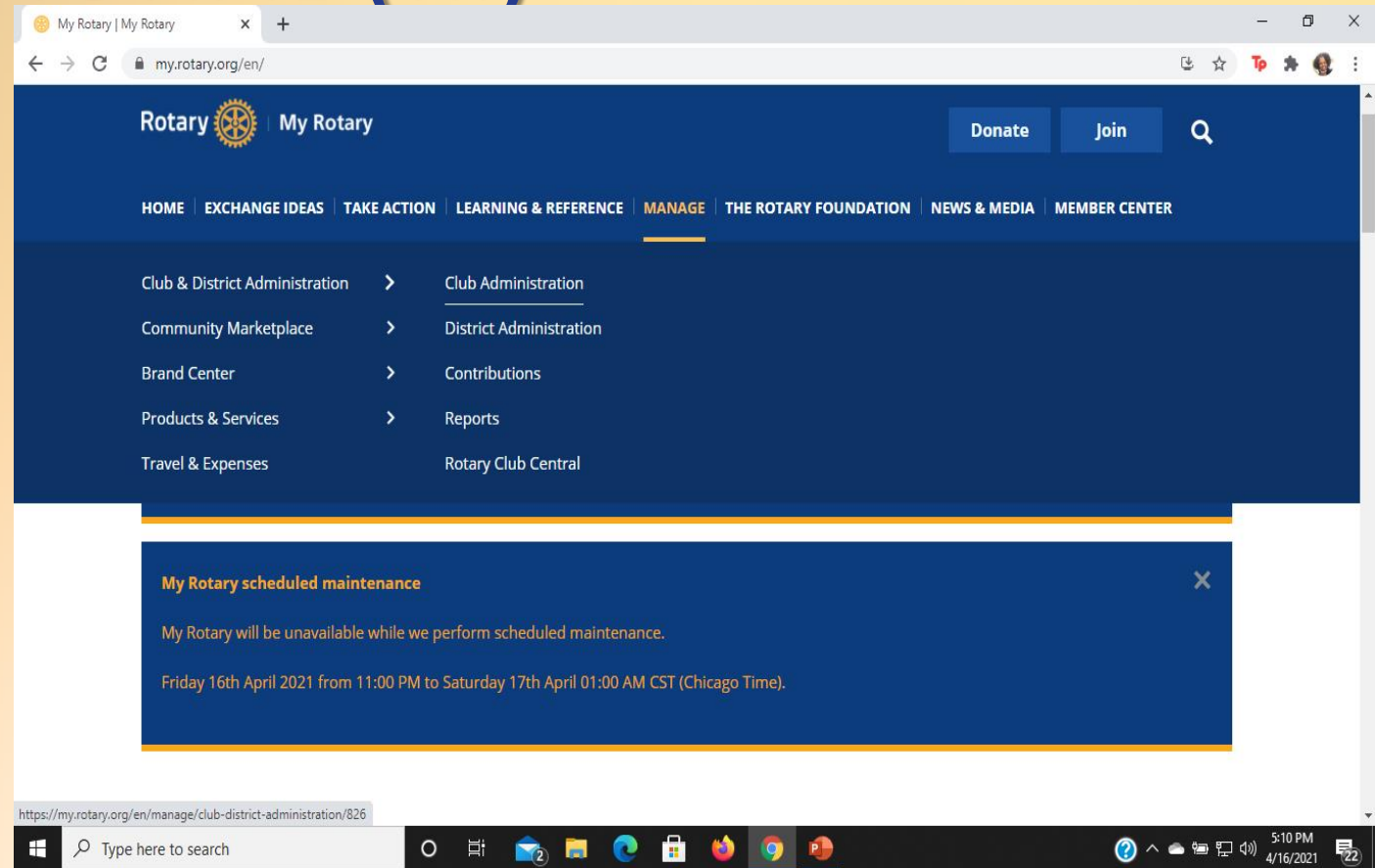
Type here to search

5:31 PM 4/16/2021



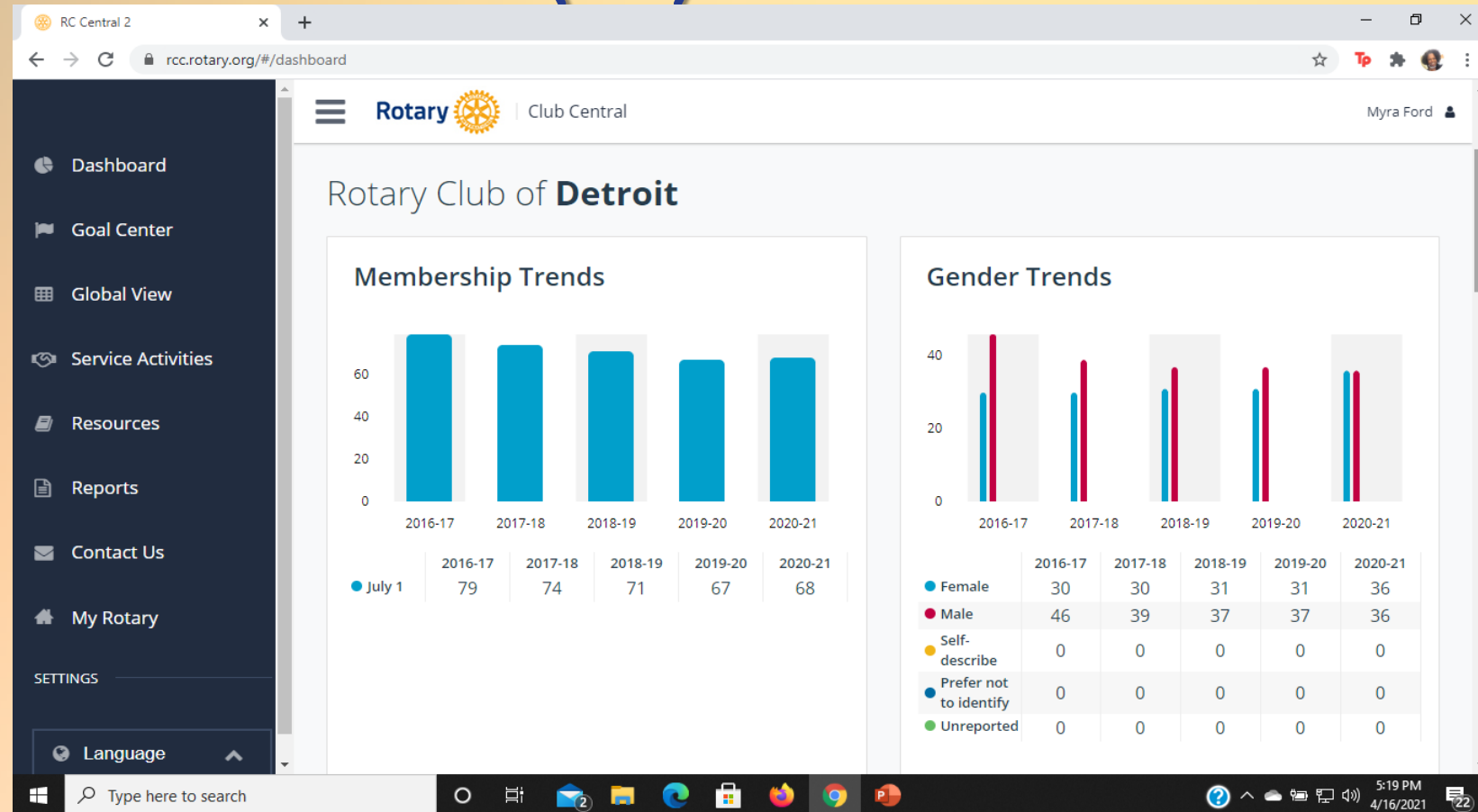
# ROTARY INTERNATIONAL (RI)

- **RI Access (cont.)**
  - **Manage**
    - **Club & District Administration**
      - Club & Member Data
      - **Manage Club Officers (dropdown)**
- **RI Record Keeping**
  - Rotaract
  - Club Sponsorship
  - Club Giving
  - Forms & Instruction



# ROTARY INTERNATIONAL (RI)

- **Rotary Club Central**
  - Dashboard
  - Goal Center
  - Global View
  - Service Activities
  - Resources
  - Reports
  - Contact Us
  - My Rotary



# District 6400 Secretary Training

## •Question & Answer

Thank you  
for serving as  
your Club Secretary

