

**Rotary Club of Castro Valley**

**Standard Operating Procedures**

**Club Secretary – Membership File & Membership List**

Updated September 1, 2016 by Jim Negri

1. Working with the Membership Chair, the Secretary is responsible for maintaining the Membership data base in ClubRunner, which uploads membership to Rotary International and District 5170 as well as generate all membership information in ClubRunner (e.g. meeting attendance sheets, mailing labels).
   1. *The Secretary has been responsible for this task for at least the past six years, but there have been discussions about it being more appropriate for the Membership Chair to handle the tasks, but no changes have been made. The current Membership Chair has asked for someone to assist with data entry, but there have been no volunteers. There are both positives and negative to each approach. Familiarity with ClubRunner and word processing are essential.*
2. Whenever a new member is approved, obtain the member’s data sheets from the Membership Chair in order to add the new member into ClubRunner and report the membership information to both RI and District 5170.
3. To add the member, log into ClubRunner with appropriate access codes and levels.
   1. Click Member Area.
   2. Under Membership Manager, click on Active Member List.
   3. Click on Add New Member.
   4. Add all of the information on each screen. New members will not have information to add on each screen, but it is essential to have the basic information.
   5. Be sure to save each screen/section.
4. Even though members can access the Membership Directory online through ClubRunner, the Club has produced a simplified Membership List, which is updated whenever there is a new member or a member has a change of information.
   1. Make the additions/corrections.
   2. In the footer, noted the date of the update and who produced the update.
   3. Email the updated Membership List to all Club members with an email address.
      1. In the email section, check for any bounced or undeliverable emails. Determine the reason for the bounce or undeliverable status. Make any necessary correction in the ClubRunner database and the Membership List.
   4. Post the most current Membership List under Club Documents in ClubRunner.
5. Wait 1-2 weeks for members to respond with any corrections before resending the Membership List. If there are no changes, wait until there are changes to update the list.